
User's Guide



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Introduction

Diamond Vision Capture Software is a production level document scanning software. Diamond Vision runs using Microsoft SQL Server 2005. Diamond Vision may be installed in a network environment or it can be run in a single workstation environment.

Standard Features

- Password Protected Login
- User Tracking and Reporting
- Batch Directory Listing
- Import Tiff Files
- Scan:
 - Twain & Isis Driver Scanning
 - Document Separation using Patch Code or other Barcodes
 - Scan Color Images
- Quality Control:
 - Flag Pages and Documents and add Reports
 - Split and Combine Documents
 - Delete Pages and Documents
- Index:
 - Fully Customizable Index Profiles
 - Database Indexing
 - Barcode Recognition
 - QC Index
 - Find and Replace Index Values
 - Index Offsite
- Export:
 - Create Folder Structure using Index Values
 - Name Documents Based on Index Value
 - Export as Tiff or PDF
 - Export Color Images
 - Custom Export Scripts

Maintenance

Installation

To install Diamond Vision, follow the options on the installation screens below:

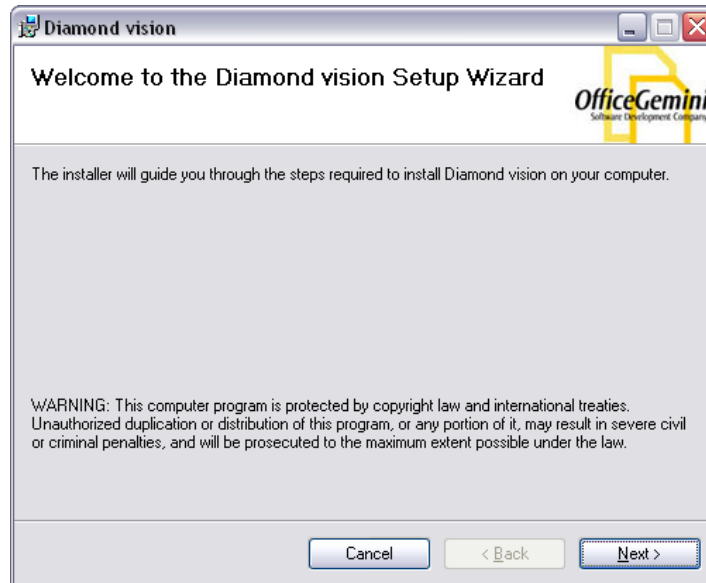


Figure 2-1. Install – Screen 1



Figure 2-2. Install – Screen 2

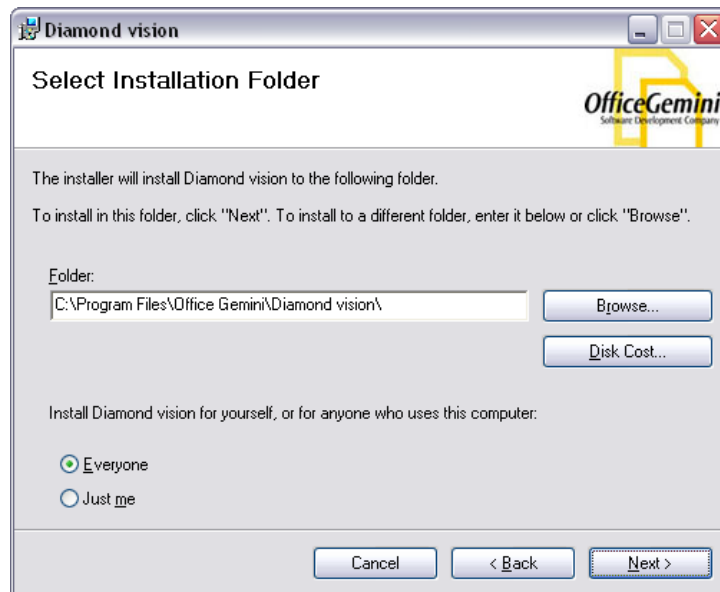


Figure 2-3. Install – Screen 3

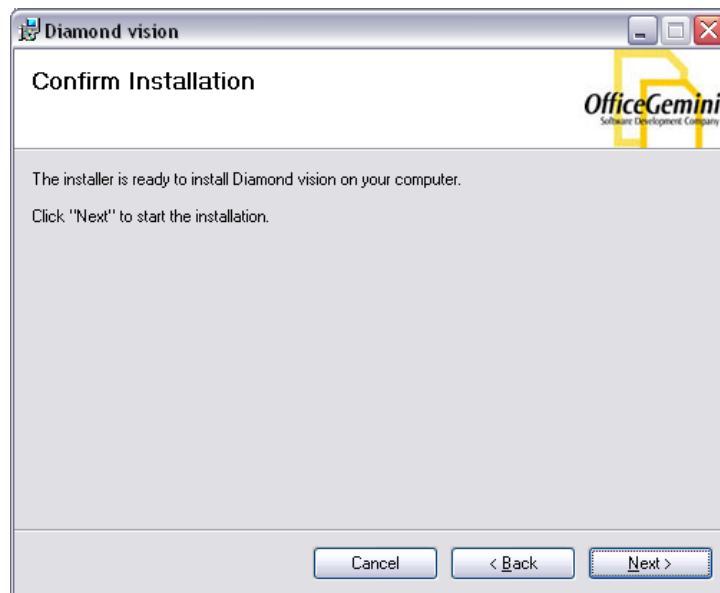


Figure 2-4. Install – Screen 4

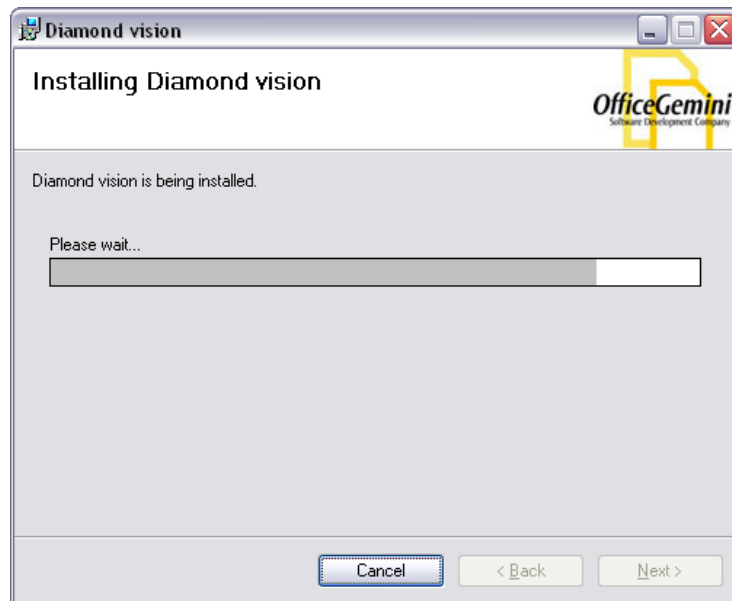


Figure 2-5. Install – Screen 5

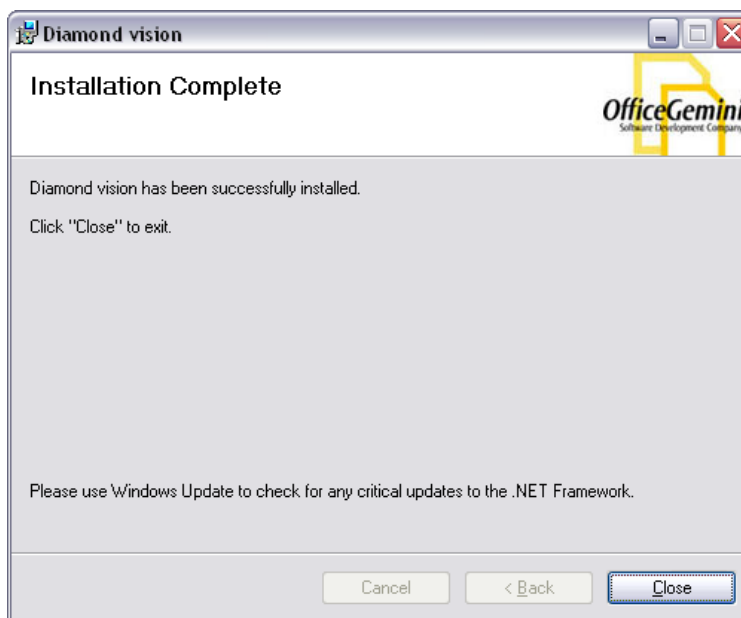


Figure 2-6. Install – Screen 6

Central Path

The first time that Diamond Vision is opened on a machine, the user will be prompted to choose a Central Path. In a networked environment, this Central Path should be a shared folder on a server. If running Diamond Vision locally, create a folder on the hard drive of the local machine and point to that folder.

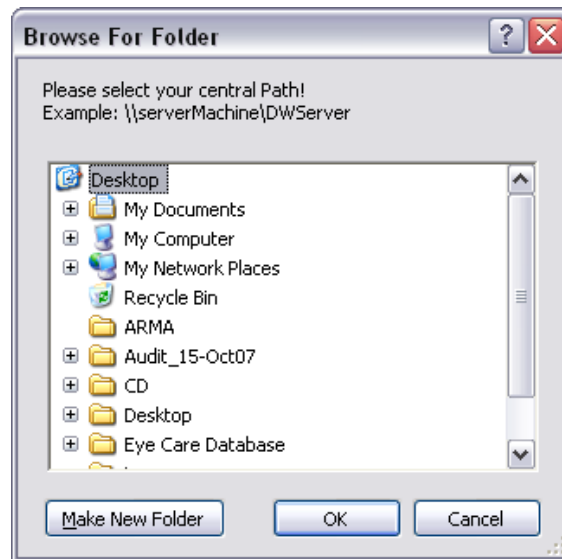



Figure 2-7. Central Path

SQL Settings

Once a Central Path is chosen, the user will be prompted to point to the SQL Server: Input the IP Address, Port #, User ID, Password, and Database Name. Click .

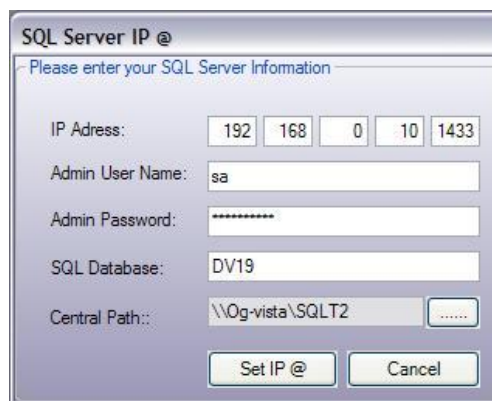


Figure 2-8. SQL Settings

Register

To register Diamond Vision, go to Help in the menu bar and select Update License.



Figure 2-9. Help – Update License

The Activation window will appear.

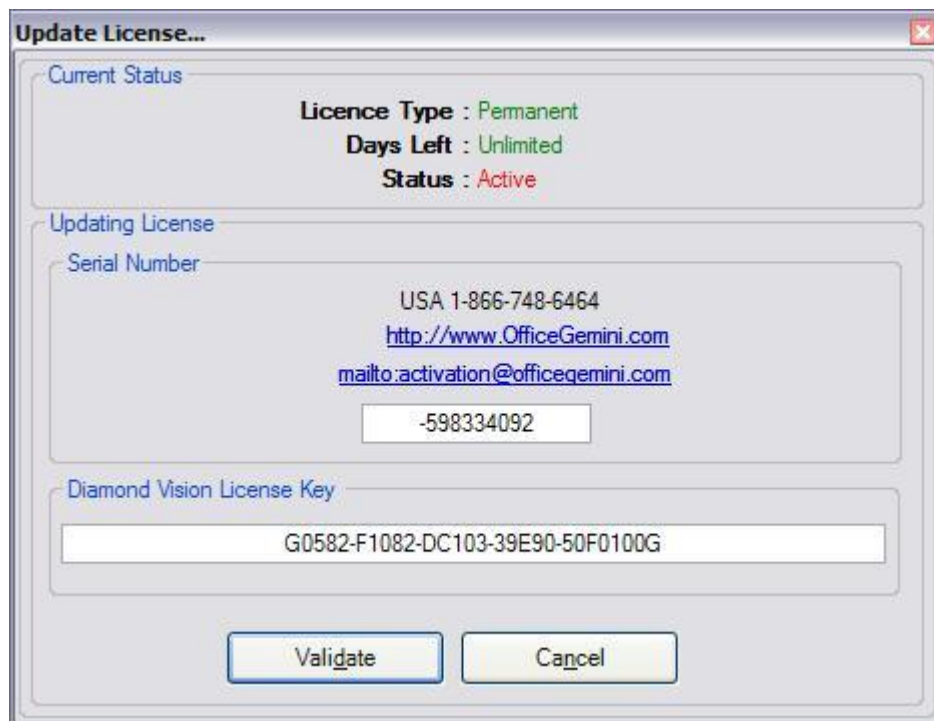



Figure 2-10. Help –Update License – Activation Window

Once the license has been purchased and an email confirmation has been received, copy the Serial Number from the Activation window and email it to activation@officegemini.com. This needs to be done to each workstation individually. A License Key will be emailed back. Enter the License Key in the Activation window and click .

Check for Updates

To check for updates and upgrades, go to Help in the menu bar and select Check Updates.



Figure 2-11. Help – Check Updates

Administration

Admin Menu

The Admin section of Diamond Vision is only accessible using admin accounts.

User Profile

To create, edit, and manage user accounts, go to: Settings>Admin Access>User Profile.

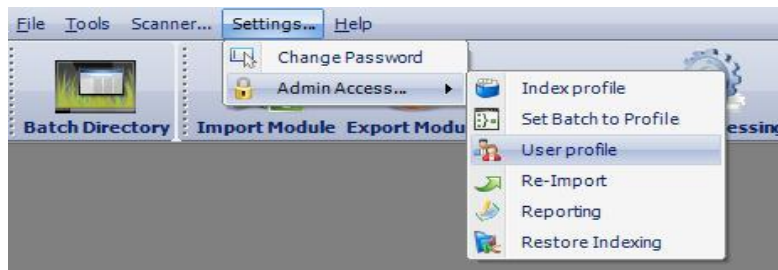





Figure 3-1. Settings – Admin Access – User Profile

Employee Information

To create a new user account, fill in the Employee Information Tab and click  **New**. To Edit an existing account, select the user account on the left side and change the necessary information, then click  **Edit**. To delete a user account, select the user account on the left side and click  **Delete**.

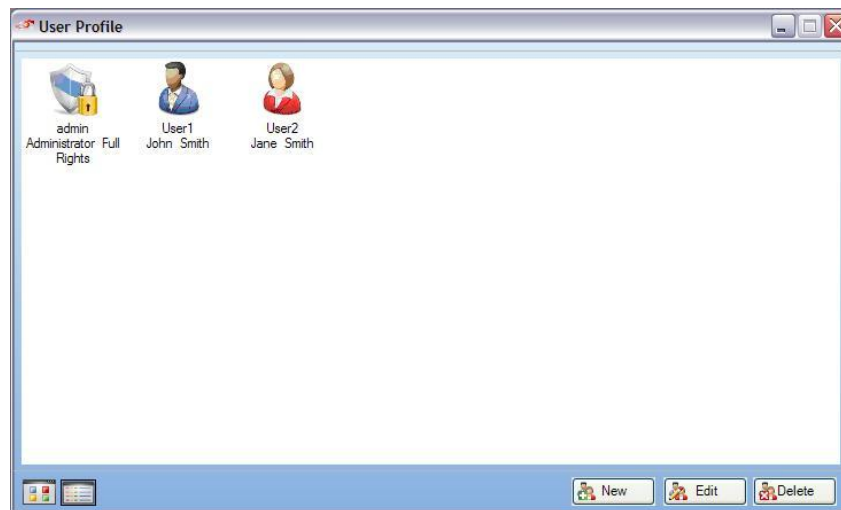
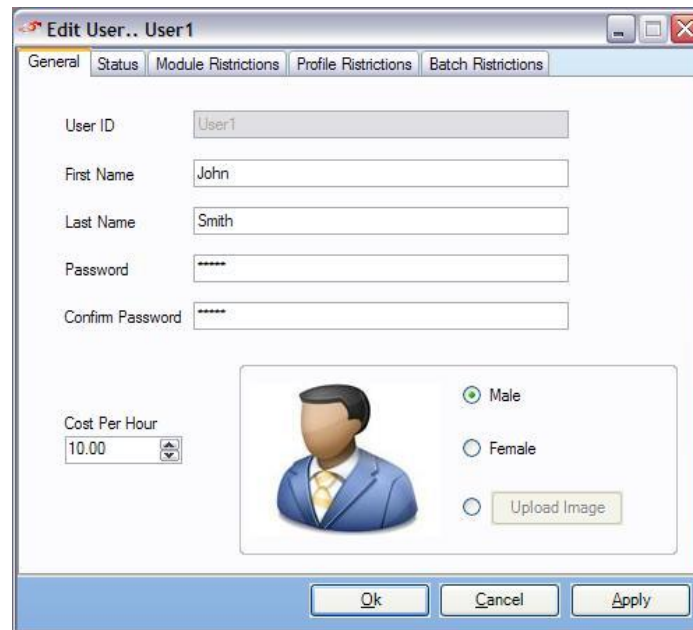


Figure 3-2. Settings – Admin Access – User Profile – Employee Information

General

The general section allows the administrator to manage user information.

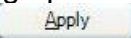


The screenshot shows a Windows-style dialog box titled "Edit User.. User1". It has five tabs: "General" (selected), "Status", "Module Restrictions", "Profile Restrictions", and "Batch Restrictions". The "General" tab contains the following fields and controls:

- User ID:** A text box containing "User1".
- First Name:** A text box containing "John".
- Last Name:** A text box containing "Smith".
- Password:** A text box with masked characters (dots).
- Confirm Password:** A text box with masked characters (dots).
- Cost Per Hour:** A numeric spinner box set to "10.00".
- Gender:** Two radio buttons, "Male" (selected) and "Female".
- Image:** A placeholder image of a man in a suit, with an "Upload Image" button next to it.

At the bottom of the dialog are three buttons: "Ok", "Cancel", and "Apply".

Figure 3-3. Settings – Admin Access – User Profile – General

Here the administrator can edit a users first and last name, as well as the users password. In the bottom section the administrator can personalize a users profile by uploading an image of the user and selecting the user's gender. The admin can also adjust the cost per hour from this tab. The cost per hour is used to manage productivity and efficiency in reporting stage (Please see Reporting). Click  when finished.

Status

The status section allows the administrator to manage employee rights.

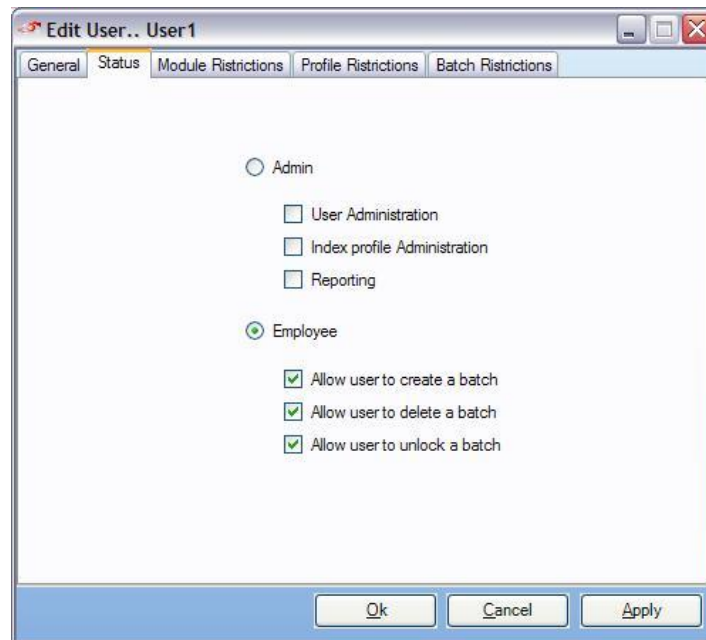



Figure 3-4. Settings – Admin Access – User Profile – Status

In this section the administrator can manage user rights. The administrator can choose whether to give the user employee rights or admin rights. Once admin or employee rights are selected, check the box next to the rights to give the user access to, and click .

Modules Restrictions

The modules restrictions section allows the administrator to manage user access to each module individually.

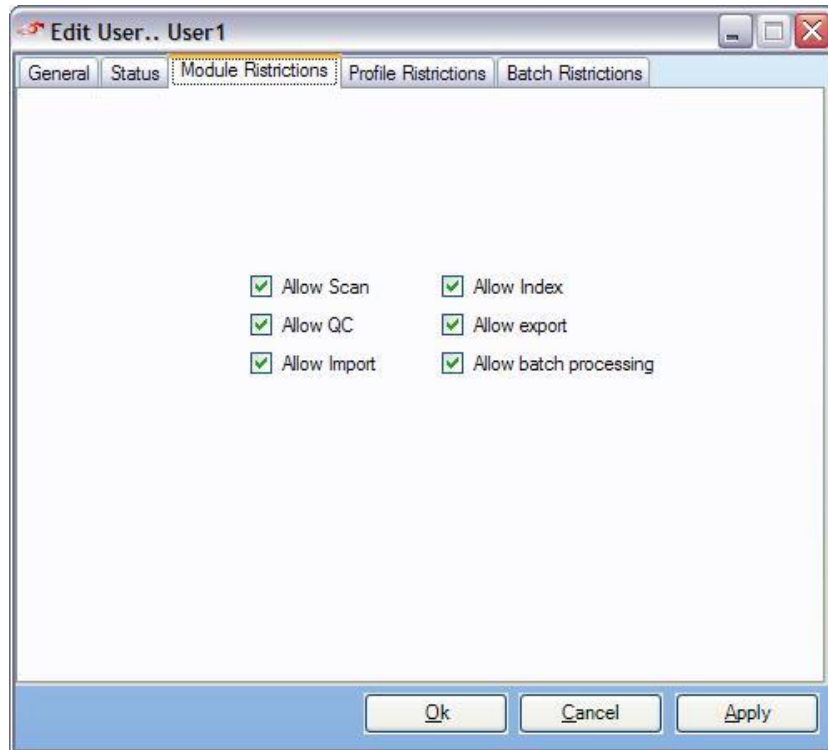
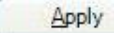


Figure 3-5. Settings – Admin Access – User Profile – Modules Restrictions

A list of the modules will appear. Check each module that the user should be showed access to and click .

Profiles Restrictions

The profiles restrictions section allows the administrator to manage access to each index profile for each user individually.

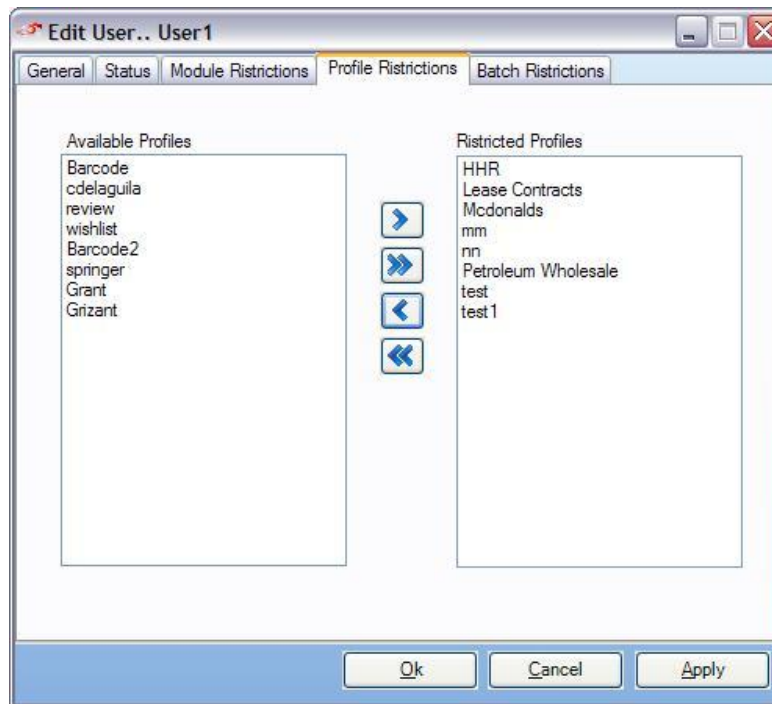





Figure 3-6. Settings – Admin Access – User Profile – Profiles Restrictions

To restrict a user access to an available profile, select a profile from Available Profiles list and click . The administrator can also give a user access to a restricted profile by selecting a restricted profile and clicking . Once profile rights are selected click .

Batches Restrictions

The batches restrictions section allows the administrator to manage user access to different batches individually.

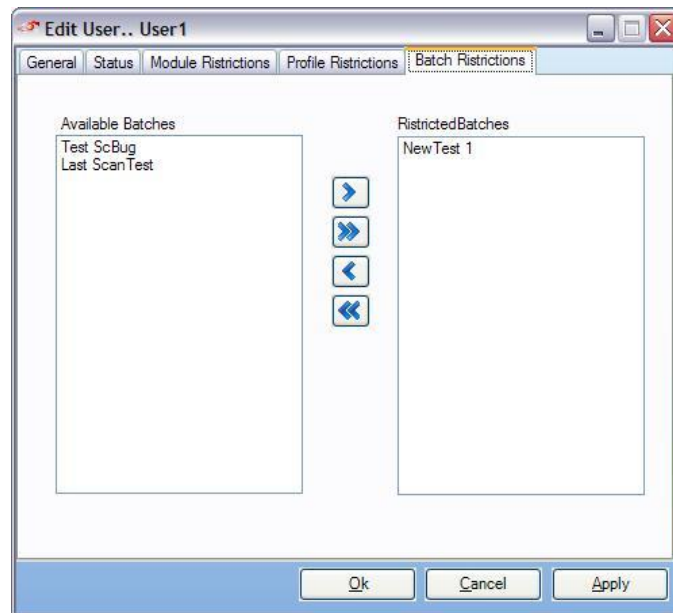




Figure 3-7. Settings – Admin Access – User Profile – Batches Restrictions

To restrict a particular batch from a certain user select a batch from available batches, and click  to restrict. The administrator can also give the user access to a restricted batch by selecting a batch from the restricted list and clicking .

Index Profile

Index Profiles are used to specify the indexing criteria for different departments or companies, depending on the use of the software. Index Profiles may be viewed as templates. To create, edit, and manage index profiles, go to: Settings>Admin Access>Index Profile.

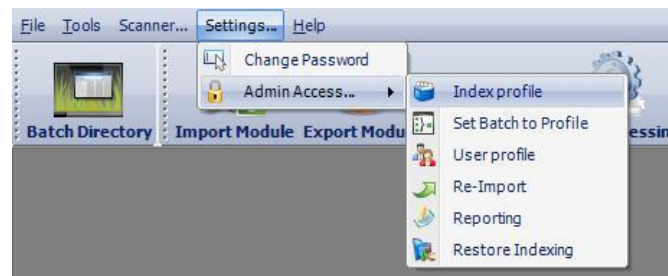


Figure 3-8. Settings – Admin Access – Index Profile

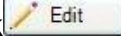
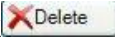
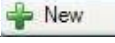
Profile

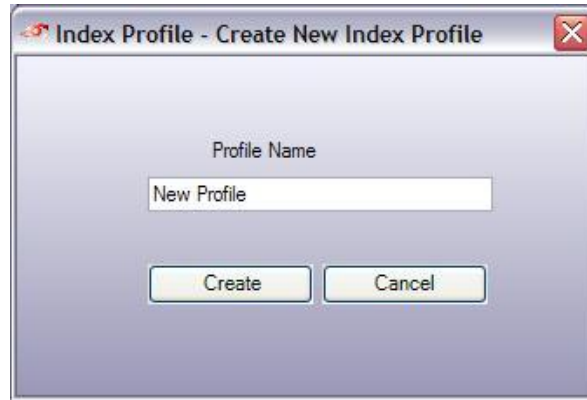
The Profile tab is where Index Profiles may be created and deleted. It is also the tab where the index fields for each profile are specified.

A screenshot of a window titled 'Manage Index Profiles -- Diamond Vision'. It contains a table with five columns: 'Index Profile Name', 'Price per page', 'Barcode / OCR Template', 'Database Validation Template', and 'Export Template'. The table lists several profiles, including 'Barcode', 'New Profile', 'Grant', 'Contracts', 'Petroleum Wholesale', 'Review1', 'springer', 'Work', 'Exam', and 'List'. At the bottom right of the window are three buttons: '+ New', 'Edit', and 'Delete'.

Index Profile Name	Price per page	Barcode / OCR Template	Database Validation Template	Export Template
Barcode	1.00	(none)	(none)	(none)
New Profile	1.00	(none)	(none)	(none)
Grant	1.00	Grant	(none)	(none)
Contracts	1.00	(none)	(none)	none
Petroleum Wholesale	1.00	(none)	(none)	none
Review1	1.00	(none)	(none)	none
springer	1.00	(none)	(none)	none
Work	1.00	(none)	(none)	none
Exam	1.00	(none)	(none)	none
List	1.00	(none)	(none)	none

Figure 3-9. Settings – Admin Access – Index Profile – Profile

To edit an existing profile, select the profile name from list and click . To delete an Index Profile from the system, select the profile from list and click . To create a new profile click , and type in new profile name.

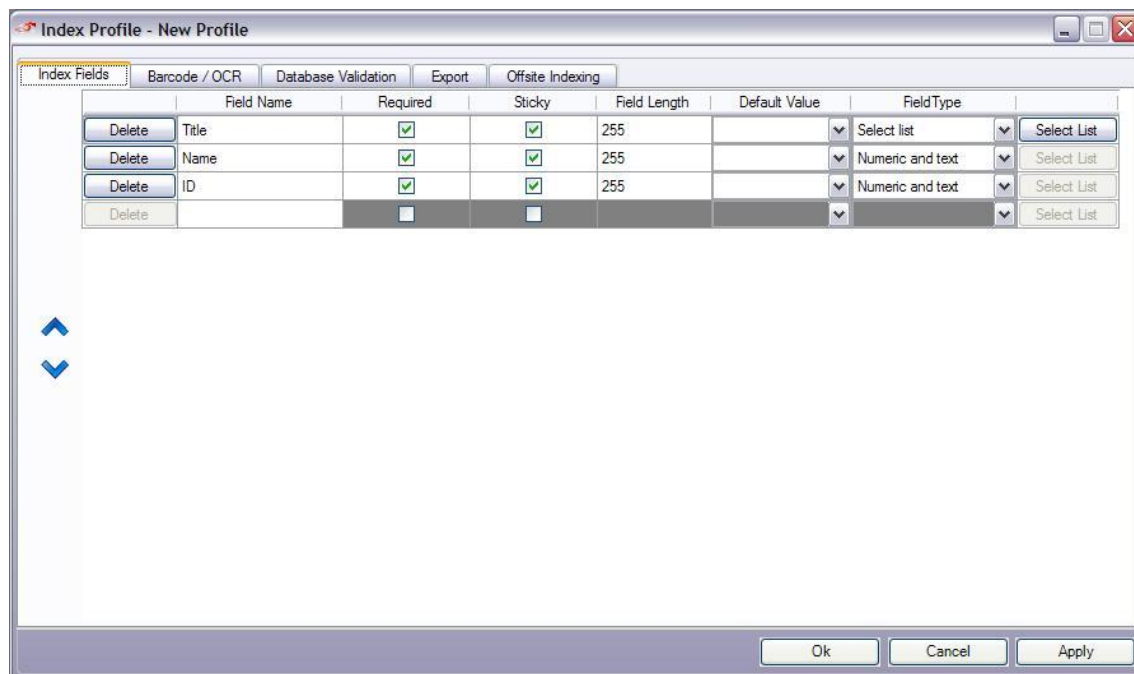


A dialog box titled "Index Profile - Create New Index Profile" with a close button (X) in the top right corner. Inside the dialog, there is a label "Profile Name" above a text input field containing the text "New Profile". Below the input field are two buttons: "Create" and "Cancel".









Figure 3-10. Settings – Admin Access – Index Profile - Profile

Index Fields

The index fields section allows the administrator to assign specific properties to each index field individually within a profile.




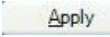


A dialog box titled "Index Profile - New Profile" with standard window controls (minimize, maximize, close) in the top right. It features a tabbed interface with the following tabs: "Index Fields" (selected), "Barcode / OCR", "Database Validation", "Export", and "Offsite Indexing". The "Index Fields" tab contains a table with the following columns: "Field Name", "Required", "Sticky", "Field Length", "Default Value", "FieldType", and "Select List".

	Field Name	Required	Sticky	Field Length	Default Value	FieldType	Select List
	Title	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	255		Select list	
	Name	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	255		Numeric and text	
	ID	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	255		Numeric and text	
		<input type="checkbox"/>	<input type="checkbox"/>				

Below the table, there are two blue arrows pointing up and down. At the bottom of the dialog are three buttons: "Ok", "Cancel", and "Apply".

Figure 3-11. Settings – Admin Access – Index Profile

Type the name of the index field. Repeat this for each field. The user can Re-order the fields using the   keys. To remove an index field, select the field in the list and click . If editing an existing profile, click  when complete.

Field Options







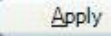
	Field Name	Required	Sticky	Field Length	Default Value	FieldType	
	Title	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	255		Select list	
	Name	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	255		Numeric and text	
	ID	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	255		Numeric and text	

Figure 3-12. Settings – Admin Access – Index Profile – Field Option

Check the desired option for each field. Required Field forces a value to be entered into the field in the Index Module, the field may not be left blank if the option is checked. Sticky Field carries the value entered in this field from the previous document onto the next document. It allows the user to stick the value entered for that field on every document, until changed. Default Value allows the administrator to enter a default value that will appear in the field during indexing rather than a blank value that is shown by default. Field Type allows the administrator to specify what type of characters may be entered in the field. Numeric and Text allows users to enter any value from the keyboard into the index field. Numeric Only allows only numbers to be entered. Text Only allows only characters, no numbers. Date forces the user to enter values in a date format. When the date option is chosen, make sure to specify a date separator such as – or /. The Field Length option allows the administrator to restrict the value entered into an index field to a certain length. This length includes spaces. Once options are set, click .

Select List

The Select List is where the administrator may specify if an Index Field should have a drop down list for users to select from when indexing.


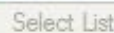




FieldType	
Select list	
Numeric and text	
Text only	
Numeric only	
Date - 00/00/0000	
Date - 00-00-0000	
Select list	

Figure 3-13. Settings – Admin Access – Index Profile – Field Option – Field Type

To create a new select list, choose select list from drop down list under Field Type. Then click **Select List**.

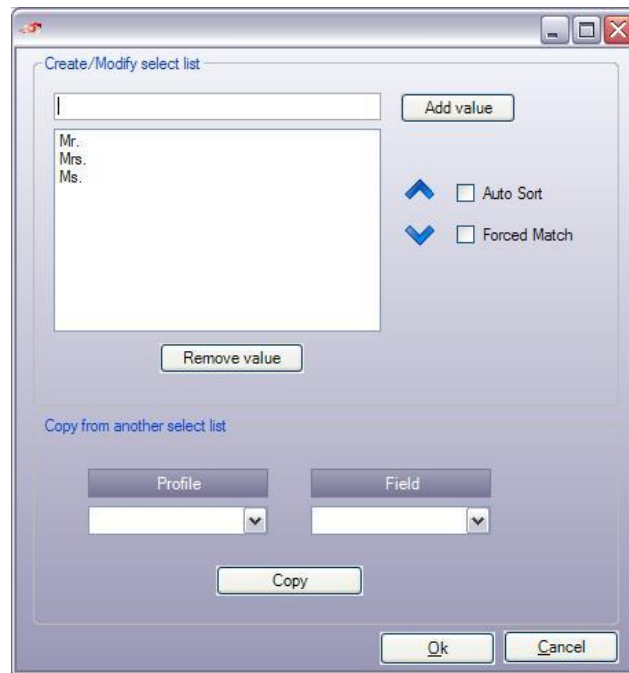




Figure 3-14. Settings – Admin Access – Index Profile – Field Option – Select List

Once an Index Field is selected, enter the values for the select list one at a time using the **Add value** button. Re-order the values using the   keys. To arrange the values in alphabetical order, check the box to Auto Sort select list in indexing stage. If the Forced Match box is selected, users will be forced to match a value from the select list into the field in the index module. To remove a value from the current select list, click **Remove value**.

To copy an existing select list from another profile, use the bottom section of the Select List form. Choose the Profile where the select list may be found and choose the Index Field that it is linked to in that profile. Click **Copy**. The values will be loaded to the currently selected Profile and Index Field.

Barcode / OCR

The Barcode/OCR section allows the administrator create or select existing barcode zone.

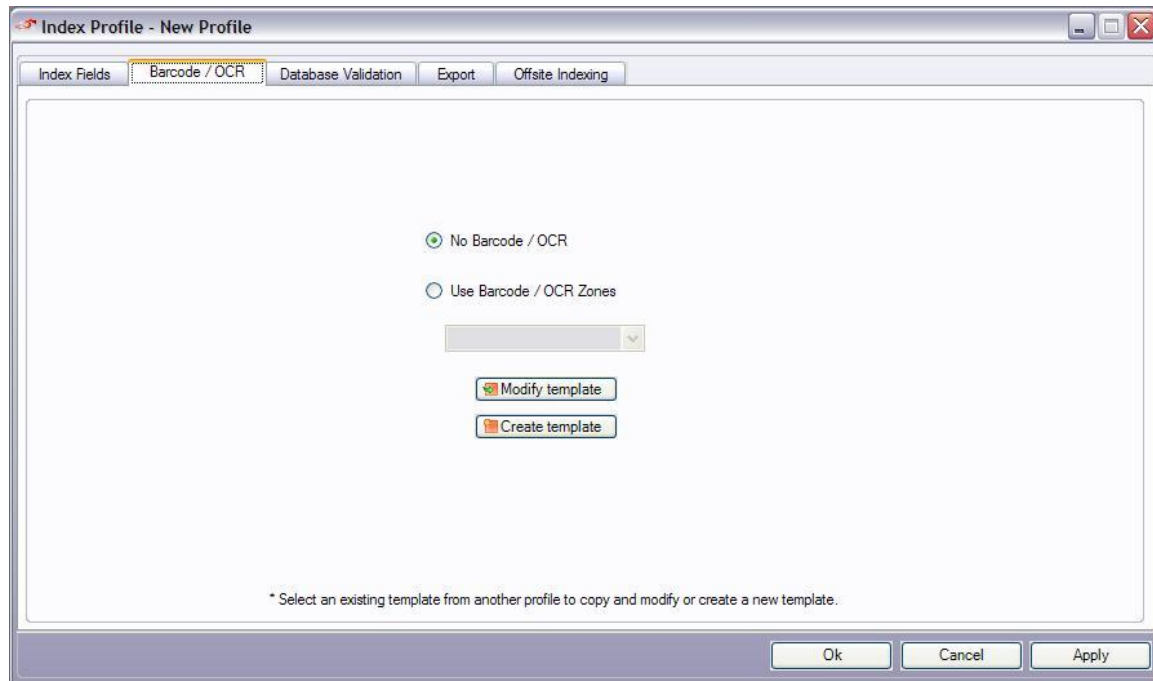


Figure 3-15. Settings – Admin Access – Index Profile – Barcode/OCR

In the barcode tab the user has the option to select a Barcode/OCR zones template. The user can create a new template by clicking . To select an existing template, click on the drop down menu and select from list. The user can also modify a template by clicking . Once setting are set click .

Database Validation

Database Validation is for linking with a Microsoft Access Database to pull information when indexing.

Index Profile - New Profile

Index Fields Barcode / OCR Database Validation Export Offsite Indexing

☒ No Database Validation ☐ Use Database Validation

Access File path (*.mdb): ...

Index field to validate:

☒ Use extra field, it will not appear in exported index file.

Table to be used:

Match column:

☒ Auto-fill index fields from results:

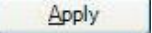
DataBase Column	Matched index to auto-fill
<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>

Ok Cancel Apply

Figure 3-15. Settings – Admin Access – Index Profile – Database Validation

Type the name of the Database Validation Template, usually the same as the Profile Name. Select the Profile that the Template is to be linked with. Browse for the .mdb file.

When indexing in the Index Module using the Database Validation Template, Diamond Vision will take the value entered into the Index Field specified and go to the Table specified in the Column specified and find that value. Once the value is found, it will fill the other Index Fields according to the value in the column they are matched with.

Select the Index Field that a value is to be manually entered into by the user. Select the Table and select the column of the table in the database that should be searched. Then, match the database columns to the corresponding index fields that should be filled. Click .

Export

The export section allows the administrator to choose an existing export template.

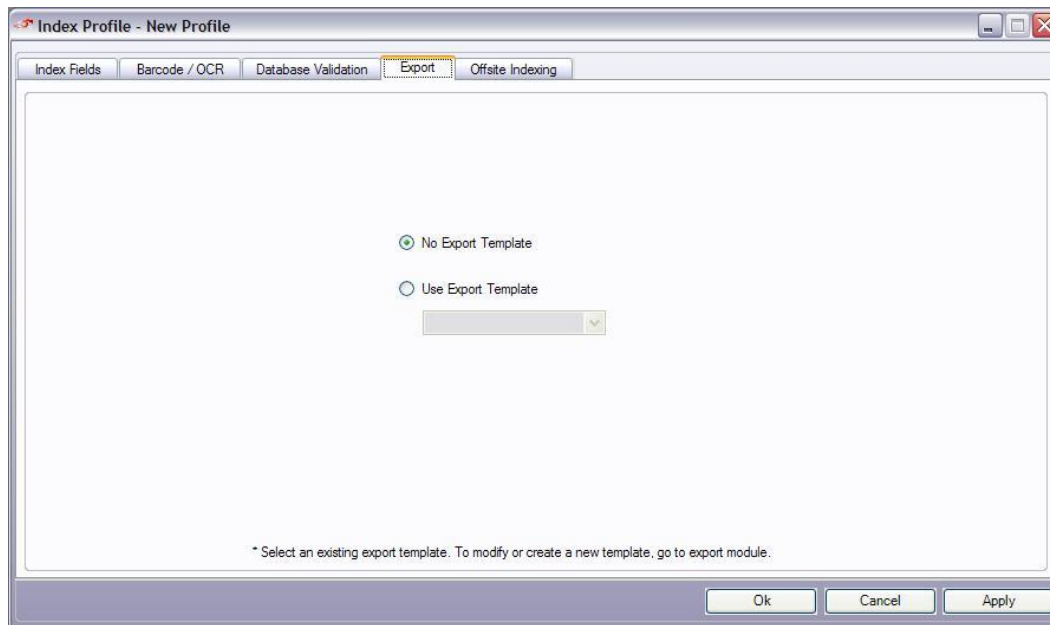


Figure 3-16. Settings – Admin Access – Index Profile – Export

In this section the user can select an export template from a previously exported batch. This option will assist the user by loading settings in the Export Module. To select an export template, check Use Export Template. Use the drop down list to select an export template. Export Templates can only be edited and modified from the Export Module.

Offsite Indexing

The External Indexing section is used to specify where the files that are copied for offsite indexing should be stored for each profile.

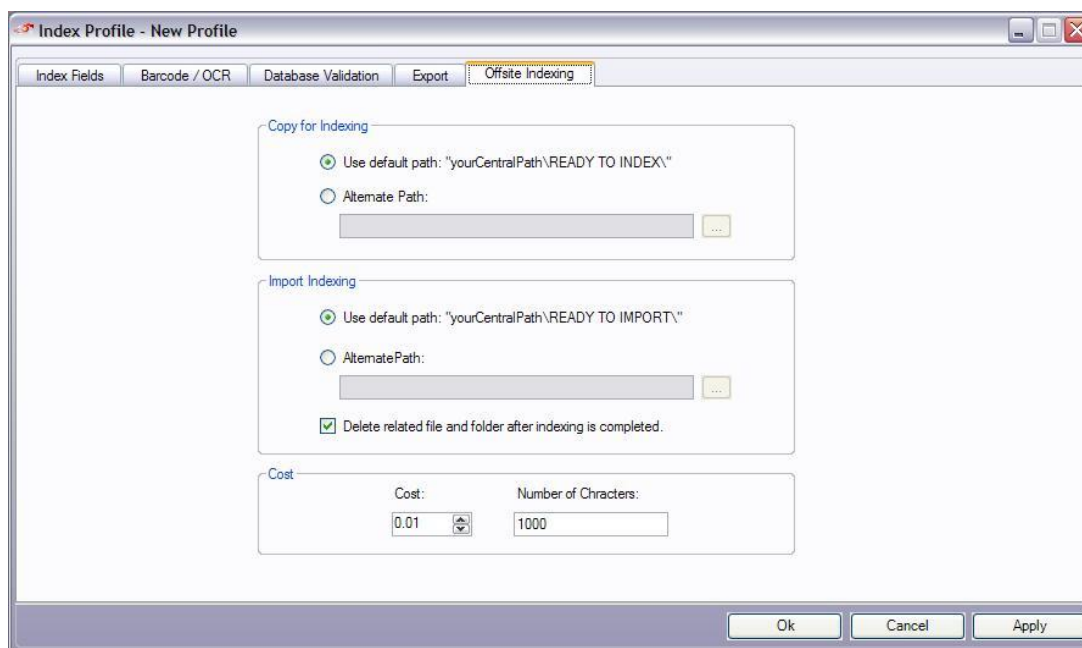



Figure 3-17. Settings – Admin Access – Index Profile – Offsite Indexing

Select the Profile to modify. By default, Diamond Vision will send the files to the Central Path in a folder labeled “READY TO INDEX\profilename”. To change the directory, uncheck the option to use the default path and then browse for the new path. The path may be either a mapped drive on the computer or a network path. There is an option to delete the folder of images after the indexing has been completed on each batch. This option cleans up the directory so that it does not have to be manually maintained. The user can also adjust cost in this tab. The cost can be adjusted by the number of characters, which are recorded for reporting purposes in the Reporting stage. Once options are set, click .

Set Batch to Profile

The Set Batch to Profile option is used to switch a batch to a different profile than it was created under, or in case the profile assignment is lost. To access this option, go to: Settings>Admin Access>Set Batch to Profile.

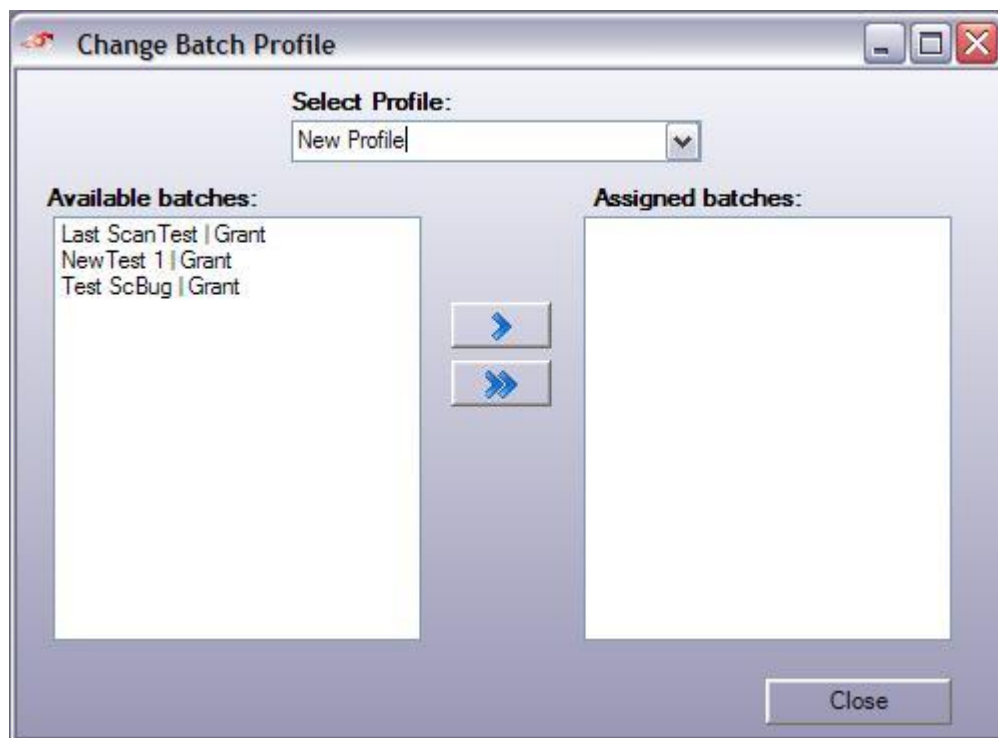



Figure 3-19. Settings – Admin Access – Set Batch to Profile

To switch a batch from one profile to another, the batch must first be removed from the current profile it is assigned to. To add a batch to a profile, select the profile to add the batch to in the Profiles drop down list. Select the batch from the Batch drop down list, and click . The batch will be added to the right side listed of batches assigned to the selected profile.

Re-Import

The Re-Import module is designed for bringing batches back into Diamond Vision after they have been exported. Once Exported from Diamond Vision, batches are moved to an Exported folder in the Central Path. This folder is watched by the Re-Import module. Batches may be brought back into Diamond Vision in the same integrity it was in before Export including indexing. To access this option, go to: Settings>Admin Access>Re-Import.

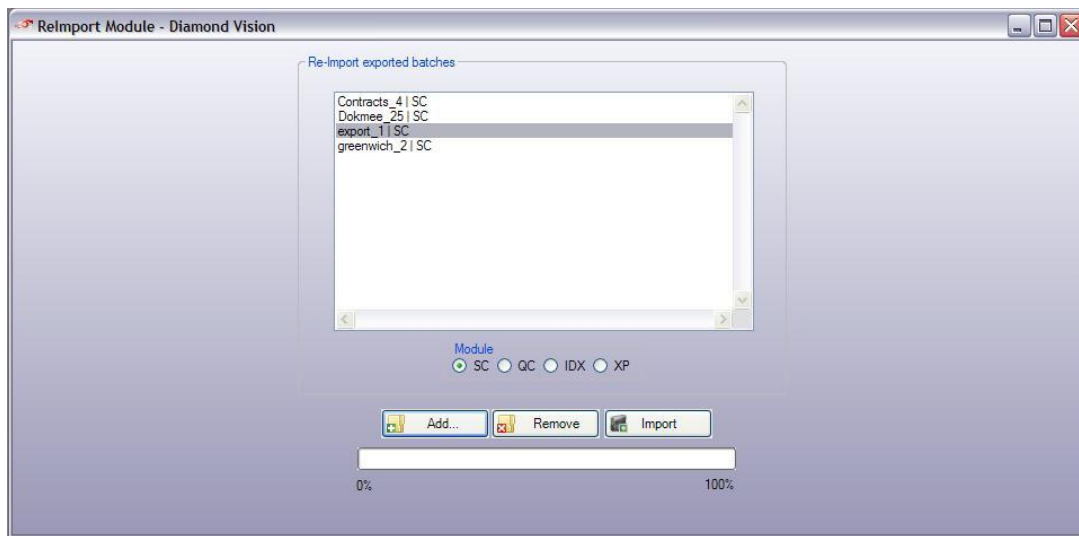
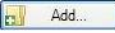
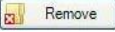



Figure 3-20. Settings – Admin Access – Re-Import

Once the Re-Import module is open, a listing of all batches in the Exported folder will be displayed on the screen. Select the batch to re-import. Click  to add previously exported batches into the Re-import Module. Multiple batches may be re-imported at one time. To remove a batch from list, click . Once all options are set, click . After the batch(s) are added, a popup prompt will indicate that re-import is complete.

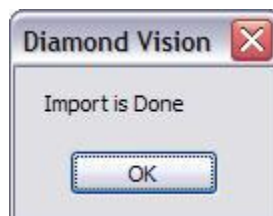


Figure 3-21. Settings – Admin Access – Re-Import

Reporting

The Reporting features tracks user activity, productivity, and revenue profits. The reporting feature may be used to track batches, profiles, users, and dates. In order to create, edit, and generate accurate custom reports, the administrator must first edit the user & index profiles. Both the user & index profiles are located under the Settings menu>admin access. To access this option, select Reporting from the Home Screen or go to: Settings>Admin Access>Reporting.

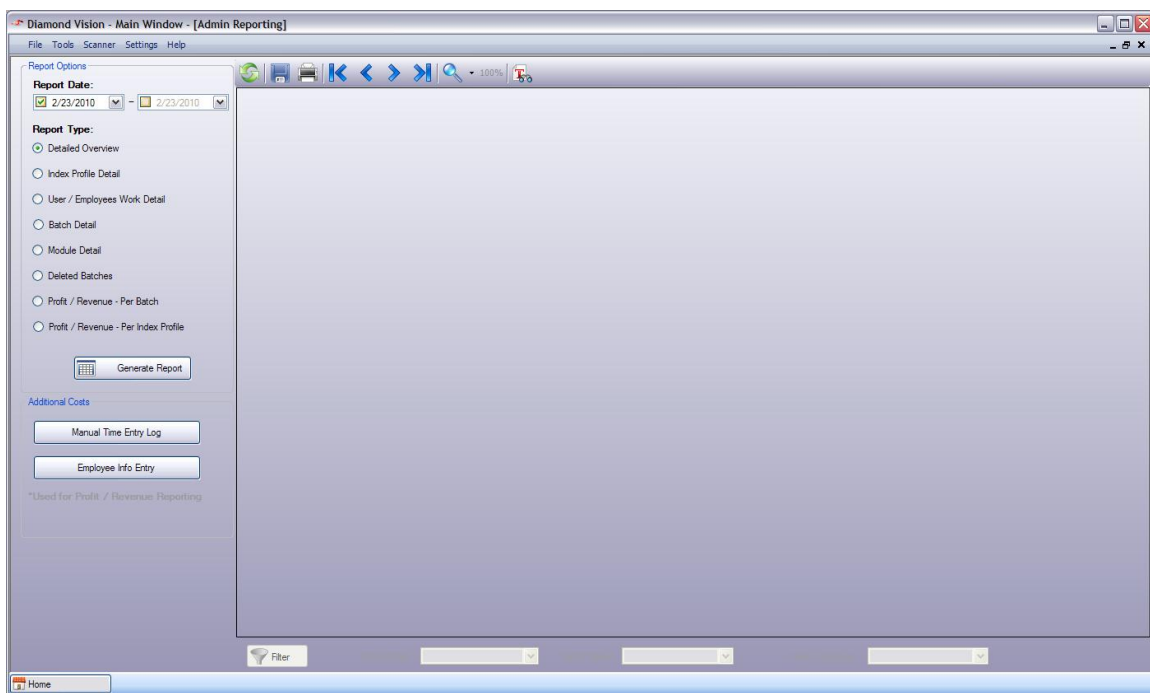
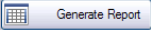
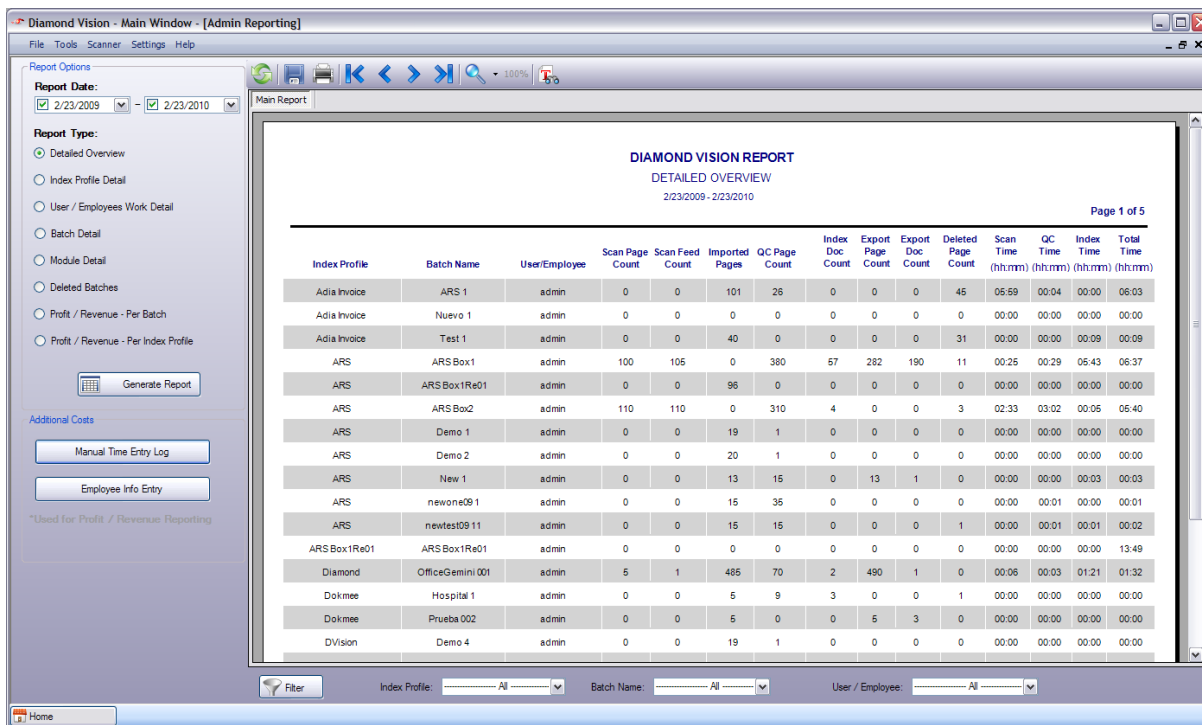


Figure 3-22. Settings – Admin Access – Reporting

Note* any batches processed before the users cost was established, won't generate accurate profits & revenue reports. The user must log into Diamond Vision and process the documents through each module in order to accurately generate a report.

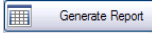
In order to generate a report, first select a report date range to search by. Next, select the report type. Then click on  to generate the report. A Detailed Overview will give the admin an overall report of all activity in Diamond Vision; this includes all index profiles, batches, users, and the amount of documents processed through each module, as well as the time spent in each module.



The screenshot shows the 'Diamond Vision - Main Window - [Admin Reporting]' application. The 'Report Options' panel on the left has 'Report Date' set to 2/23/2009 - 2/23/2010 and 'Report Type' set to 'Detailed Overview'. The 'Generate Report' button is visible. The main report area displays a table titled 'DIAMOND VISION REPORT DETAILED OVERVIEW 2/23/2009 - 2/23/2010'. The table has 15 columns: Index Profile, Batch Name, User/Employee, Scan Page Count, Scan Feed Count, Imported Pages, QC Page Count, Index Doc Count, Export Page Count, Export Doc Count, Deleted Page Count, Scan Time (hh:mm), QC Time (hh:mm), Index Time (hh:mm), and Total Time (hh:mm). The table lists various index profiles and batches, including 'Adia Invoice', 'ARS', 'ARS Box1', 'ARS Box1Re01', 'ARS Box2', 'ARS Demo 1', 'ARS Demo 2', 'ARS New 1', 'ARS newone09 1', 'ARS newtest09 11', 'ARS Box1Re01', 'Diamond OfficeGemini 001', 'Dokmee Hospital 1', 'Dokmee Prueba 002', and 'DVision Demo 4'. The bottom of the window includes a 'Filter' section with dropdown menus for 'Index Profile', 'Batch Name', and 'User / Employee', all set to 'All'.

Index Profile	Batch Name	User/Employee	Scan Page Count	Scan Feed Count	Imported Pages	QC Page Count	Index Doc Count	Export Page Count	Export Doc Count	Deleted Page Count	Scan Time (hh:mm)	QC Time (hh:mm)	Index Time (hh:mm)	Total Time (hh:mm)
Adia Invoice	ARS 1	admin	0	0	101	26	0	0	0	45	05:59	00:04	00:00	06:03
Adia Invoice	Nuevo 1	admin	0	0	0	0	0	0	0	0	00:00	00:00	00:00	00:00
Adia Invoice	Test 1	admin	0	0	40	0	0	0	0	31	00:00	00:00	00:09	00:09
ARS	ARS Box1	admin	100	105	0	380	57	282	190	11	00:25	00:29	05:43	06:37
ARS	ARS Box1Re01	admin	0	0	96	0	0	0	0	0	00:00	00:00	00:00	00:00
ARS	ARS Box2	admin	110	110	0	310	4	0	0	3	02:33	03:02	00:05	05:40
ARS	Demo 1	admin	0	0	19	1	0	0	0	0	00:00	00:00	00:00	00:00
ARS	Demo 2	admin	0	0	20	1	0	0	0	0	00:00	00:00	00:00	00:00
ARS	New 1	admin	0	0	13	15	0	13	1	0	00:00	00:00	00:03	00:03
ARS	newone09 1	admin	0	0	15	35	0	0	0	0	00:00	00:01	00:00	00:01
ARS	newtest09 11	admin	0	0	15	15	0	0	0	1	00:00	00:01	00:01	00:02
ARS Box1Re01	ARS Box1Re01	admin	0	0	0	0	0	0	0	0	00:00	00:00	00:00	13:49
Diamond	OfficeGemini 001	admin	5	1	485	70	2	490	1	0	00:06	00:03	01:21	01:32
Dokmee	Hospital 1	admin	0	0	5	9	3	0	0	1	00:00	00:00	00:00	00:00
Dokmee	Prueba 002	admin	0	0	5	0	0	5	3	0	00:00	00:00	00:00	00:00
DVision	Demo 4	admin	0	0	19	1	0	0	0	0	00:00	00:00	00:00	00:00

Figure 3-23. Settings – Admin Access – Reporting – Detailed Overview

The Index Profile Detail Report will display the Number of Pages scanned, QC'd, Indexed, and Exported through each profile. As well as the time spent on each Module. In order to generate a report, first select a report date range to search by. Then click on  to generate and view the report.

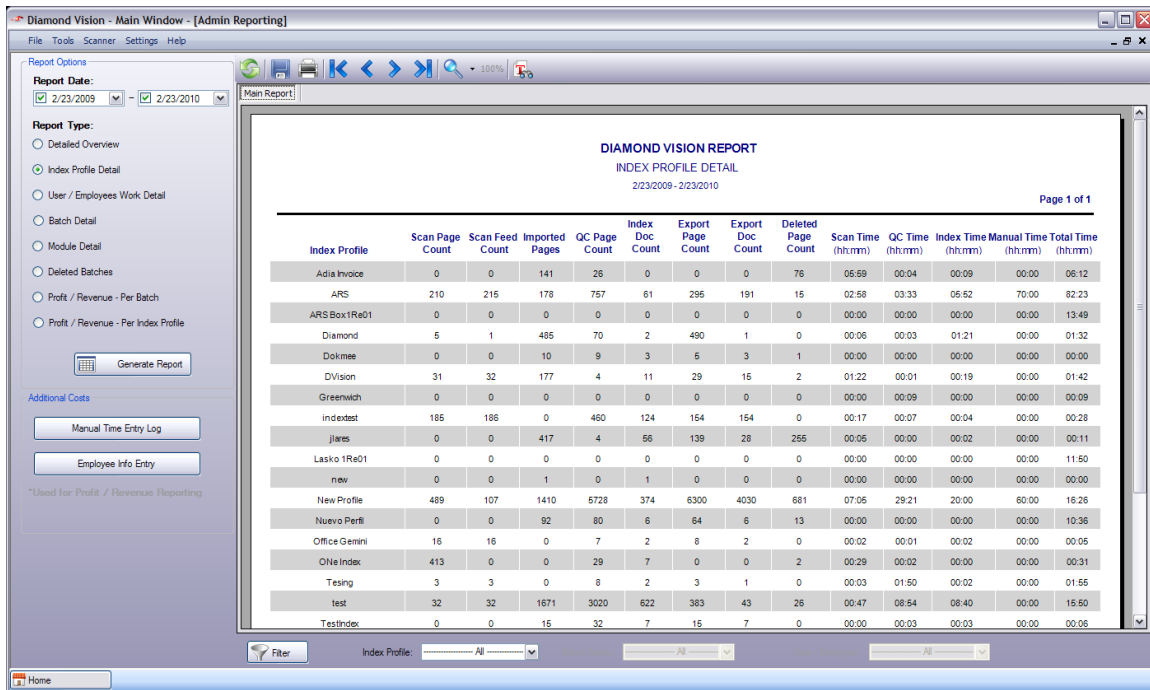
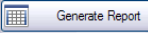


Figure 3-24. Settings – Admin Access – Reporting – Index Profile Detailed

The User / Employee Work Detail Report will display all employees who processed documents through any of the available Modules in Diamond Vision. In order to generate a report, first select a report date range to search by. Then click on  to generate and view the report.

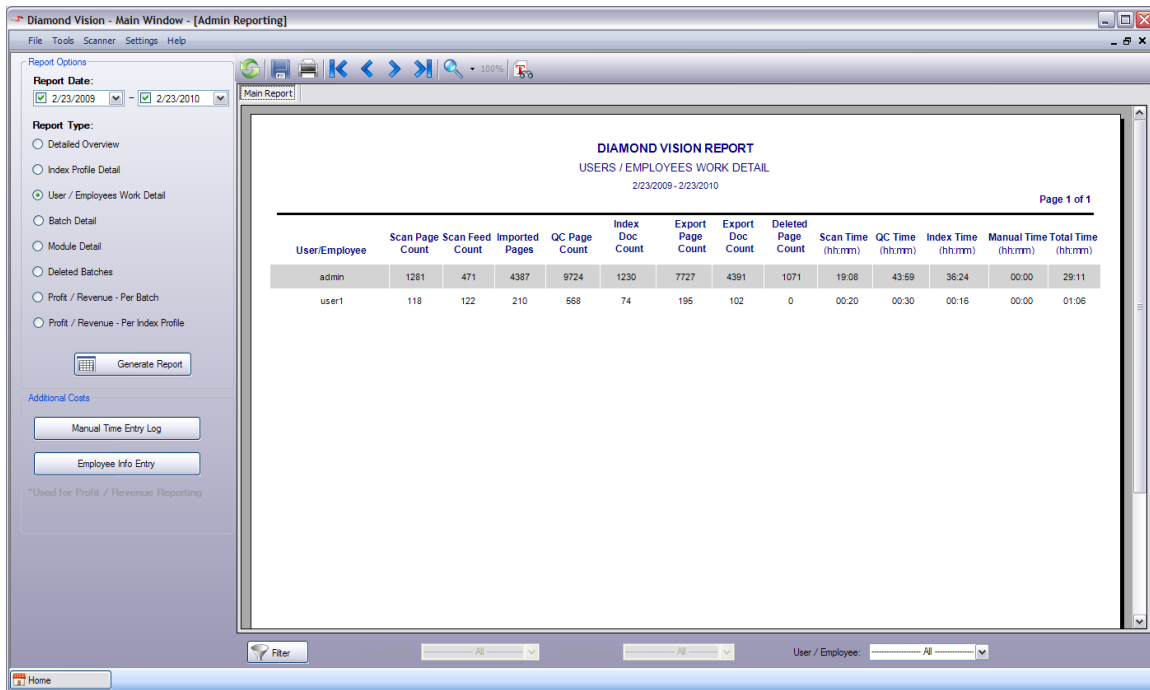
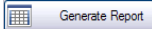


Figure 3-25. Settings – Admin Access – Reporting – User/ Employee Detail

The Batch Detail Report will display the Number of Pages scanned, QC'd, Indexed, and Exported through each profile. As well as the time spent on each Module. In order to generate a report, first select a report date range to search by. Then click on  to generate and view the report.

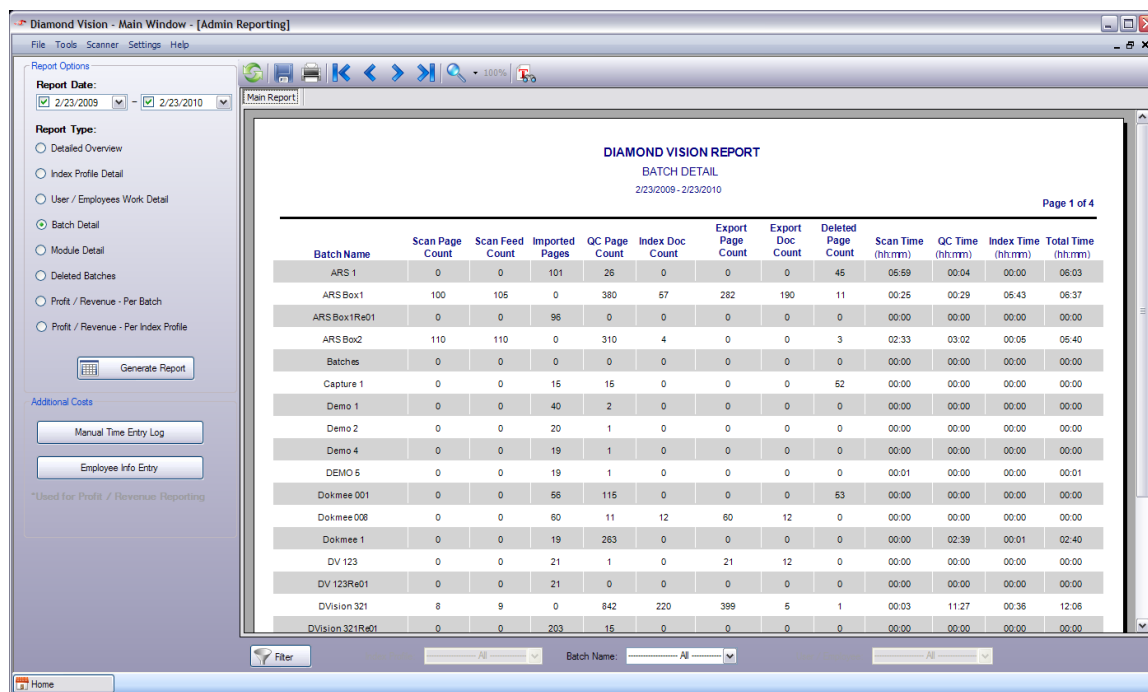
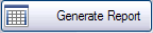
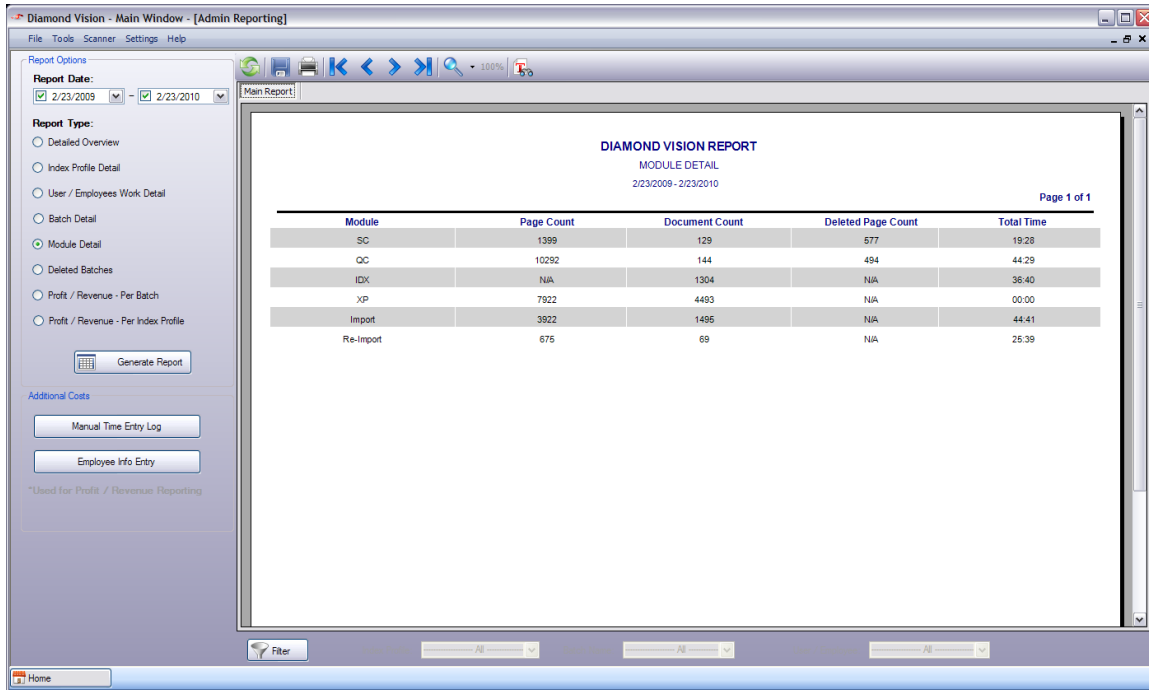


Figure 3-26. Settings – Admin Access – Reporting – Batch Detail

The Module Detail Report will show all Modules available in Diamond Vision, along with the count of pages, documents, and deleted pages. A total time to each Module will also be shown. In order to generate a report, first select a report date range to search by. Then click on  to generate and view the report.

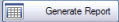


Report Options

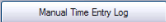
Report Date: 2/23/2009 - 2/23/2010

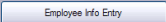
Report Type:

- ☐ Detailed Overview
- ☐ Index Profile Detail
- ☐ User / Employees Work Detail
- ☐ Batch Detail
- ☒ Module Detail
- ☐ Deleted Batches
- ☐ Profit / Revenue - Per Batch
- ☐ Profit / Revenue - Per Index Profile

 Generate Report

Additional Costs

 Manual Time Entry Log


 Employee Info Entry

*Used for Profit / Revenue Reporting

DIAMOND VISION REPORT
MODULE DETAIL
2/23/2009 - 2/23/2010
Page 1 of 1

Module	Page Count	Document Count	Deleted Page Count	Total Time
SC	1399	129	577	19:28
QC	10292	144	494	44:29
IDX	N/A	1304	N/A	36:40
XP	7922	4493	N/A	00:00
Import	3922	1495	N/A	44:41
Re-Import	675	69	N/A	25:39

Figure 3-27. Settings – Admin Access – Reporting – Module Detail

The Deleted Batches Report will show all batches deleted from Diamond Vision. In order to generate a report, first select a report date range to search by. Then click on  Generate Report to generate and view the report.

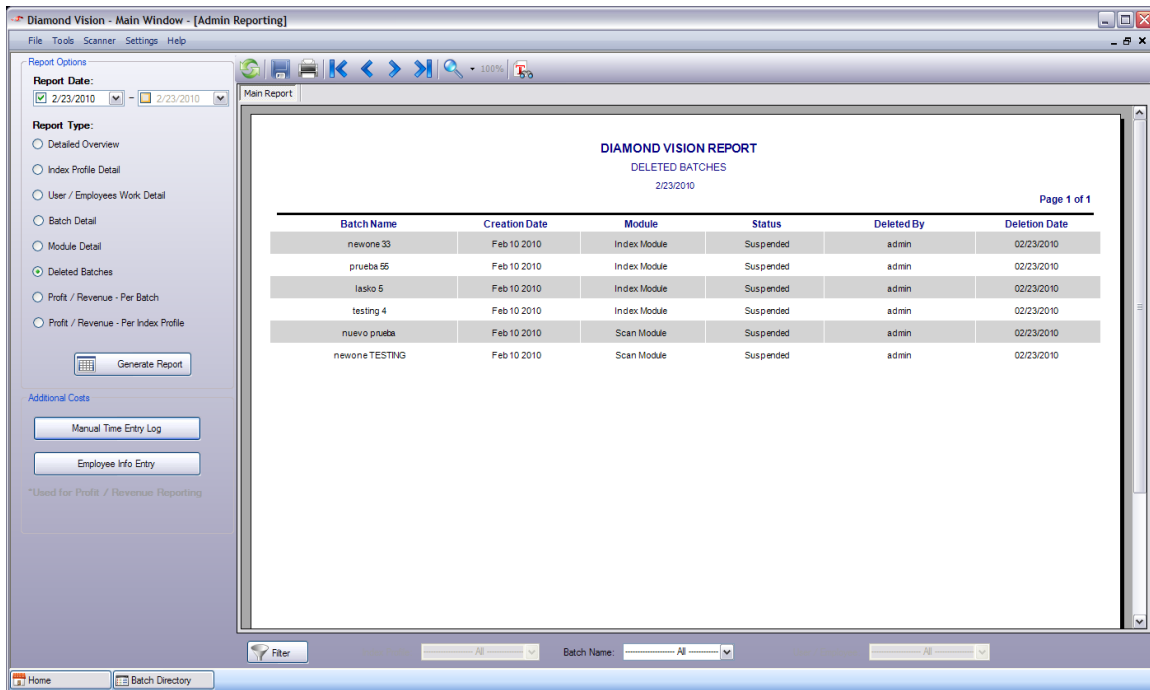
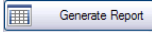


Figure 3-28. Settings – Admin Access – Reporting – Deleted Batches

Under the Profit / Revenue per batch report type, Diamond Vision will calculate the users cost under the cost section based on the amount of time recorded by the user. The cost per page of the index profile will also be calculated under the revenue section. The calculated total figure will then be available under the profit section. In order to generate a report, first select a report date range to search by. Then click on  to generate and view the report

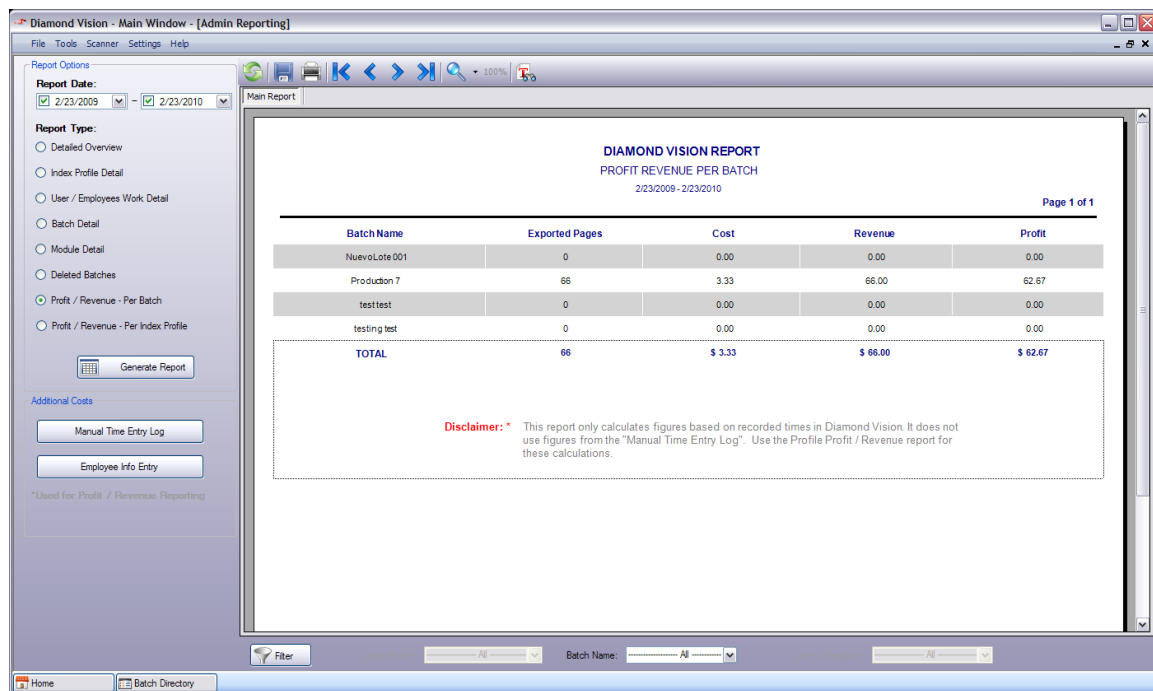


Figure 3-29. Settings – Admin Access – Reporting – Profit / Revenue per Batch

The additional cost section, allows the admin to manually add any expenses that occur outside of diamond vision. Select **Employee Info Entry**, to view available employees and their cost per hour. The employees listed here, are employees who do not have access to diamond vision; such as employees who prep documents.

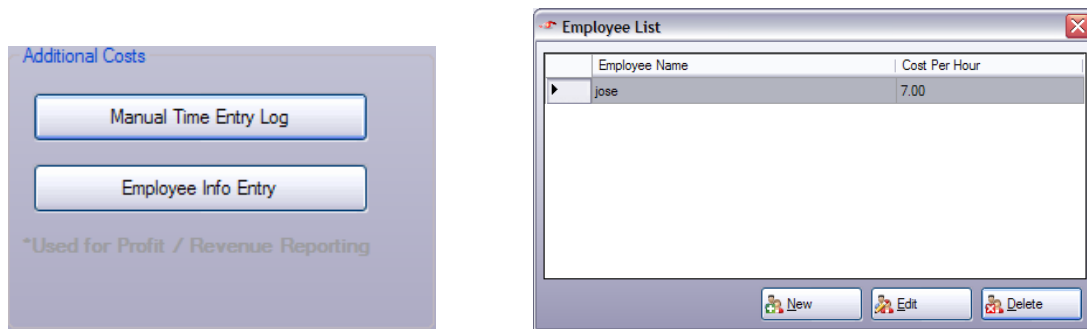


Figure 3-30. Settings – Admin Access – Reporting – Additional Cost – Employee Entry

Here you may also create, or edit an existing employee name and cost per hour. Once the employees information has been entered; click manual time entry log, in order to assign the employee to an index profile; the date and time spent on the profile can also be adjusted to accurately generate a report with all cost included.

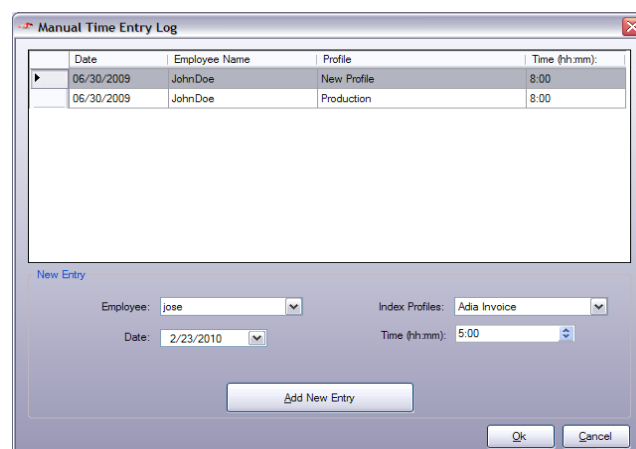
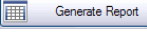


Figure 3-31. Settings – Admin Access – Reporting – Additional Cost – Manual Entry

Under the Profit / Revenue per Index Profile report type, Diamond Vision will calculate the users cost, along with the additional employees cost under the cost section based on the amount of time recorded by the user. The cost per page of the index profile will also be calculated under the revenue section. The calculated total figure will then be available under the profit section. In order to generate a report, first select a report date range to search by. Then click on  to generate and view the report.

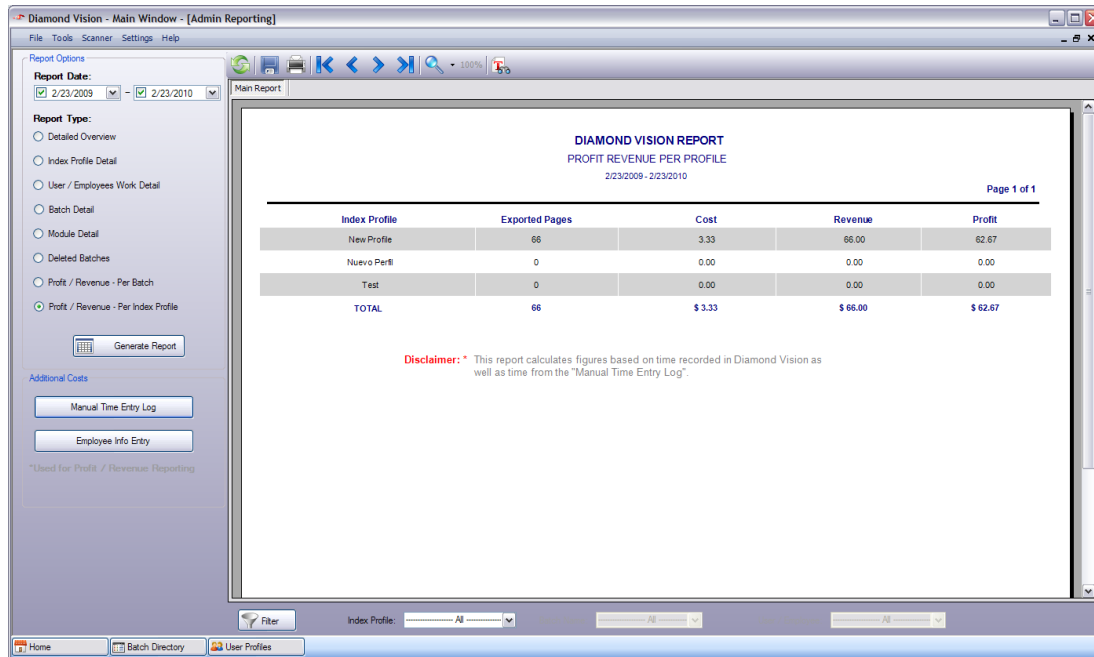
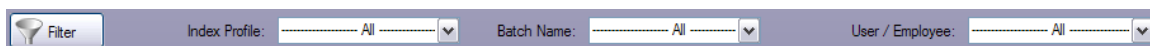





Figure 3-32. Settings – Admin Access – Reporting – Profit / Revenue per Index Profile

After a report has been generated, the user may use the filtering options below each report. These filters will vary on the report type.



Once a report is generated it may be exported using the  button on the toolbar. Available export types are Crystal Reports, adobe PDF, Microsoft Excel & Word, & text format. The report may be printed using the  button. To search the text of the report, use the  button.

Batch Directory

The Batch Directory lists all batches that are contained in the specified Central Path for Diamond Vision. Batches are listed by Batch Name, Profile, Date, Module, Status, and User. The date listed is always the creation date of the batch. The module listed in the current module that the batch sets in. The status is an indication of whether a batch is ready, in progress, suspended, needs rescans, or has an error. The user indicates which user is currently accessing or last accessed the batch.

Batch Name	Profile	Date	Module	Status	User
Contracts 4	Lease Contracts	03/19/2009	Quality Control	Ready	admin
NewTest 1	New Profile	09/03/2008	Index Module	Ready	admin
Test SoBug	Grant	09/10/2008	Quality Control	Ready	admin
Last ScanTest	Grant	09/10/2008	Quality Control	Ready	admin
Dokmee 25	test	03/19/2009	Quality Control	Ready	admin
greenwich 2	Barcode	03/19/2009	Quality Control	Ready	admin

New Batch
Batch Name:
Batch Number:
Profile:

Choose Module
☐ SC ☒ QC ☐ BC ☐ IDX
☐ Export File(s)

Change status
☒ Ready ☐ Suspended ☐ Error
☐ Rescan File(s)


Figure 4-1. Batch Directory

Creating Batches

To create a new batch, open the Batch Directory and go to the New Batch section of the form.

New Batch
Batch Name:
Batch Number:
Profile:

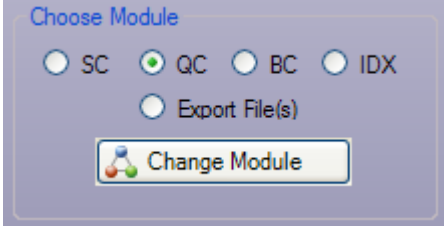
Figure 4-2. Batch Directory – New Batch

Type the Name of the new Batch in the Batch Name field, do not enter any spaces. In the Batch Number field, enter either characters or letters, do not enter any spaces. The Batch Name listed in the Batch Directory will be as follows: "BatchName_BatchNumber". Select a Profile that the Batch should be assigned to. Click .

Batch Management


Change Module

To change the Module that a batch is in, select the batch in the Batch Directory and go to the Choose Module section of the form.



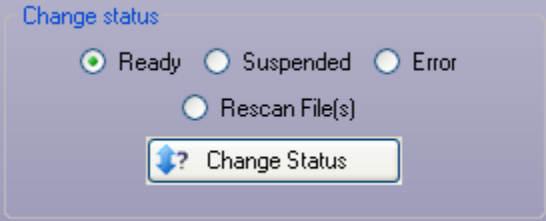
The "Choose Module" dialog box contains four radio buttons: SC, QC (which is selected), BC, and IDX. Below these is an "Export File(s)" option with a radio button. At the bottom is a button labeled "Change Module" with a small icon of three people.

Figure 4-3. Batch Directory – Change Module

Select the Module that the Batch should be in and click . Module abbreviations: SC=Scan, QC=Quality Control, IDX=Index, XP=Export.


Change Status

To change the Status of a batch, select the batch in the Batch Directory and go to the Change Status section of the form.



The "Change status" dialog box contains four radio buttons: Ready (which is selected), Suspended, Error, and Rescan File(s). At the bottom is a button labeled "Change Status" with a small icon of a blue arrow pointing up and down.

Figure 4-4. Batch Directory – Change Status

Select what the Status of the Batch should be and click . Ready indicates that the batch is ready to be opened in the current module and has not yet been opened in that module. Suspended indicates that the batch was opened in the current module, but not yet completed. Error indicates that there is an error with a batch, most commonly, and export error. Rescan File(s) indicates that images need to be rescanned in the batch. When a batch is open on a machine, the Status will be displayed as In Progress.

Process Batch



To open a batch in its current module, select the batch in the Batch Directory and click , or right click on the batch and select Process Batch.



Figure 4-5. Batch Directory – Process Batch

Delete Batch

To delete a batch from the system, select the Batch in the Batch Directory and click , or right click on the batch and select Delete Batch.

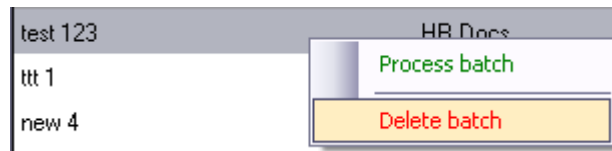
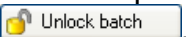


Figure 4-6. Batch Directory – Delete Batch

Unlock Batch

Some times when Diamond Vision encounters an error or is closed improperly, a batch may get stuck in the In Progress status, even though the batch is not open on any machines. Batches may not be opened when in the In Progress status. To get the batch back to Suspended status, select the batch in the batch directory, and click . The Batch will be left in the current module and placed in Suspended status.

Tiff Import

Import Module

The Import Module allows users to import tiff files into Diamond Vision for processing. To access this module click the Import Module button on the main interface toolbar.

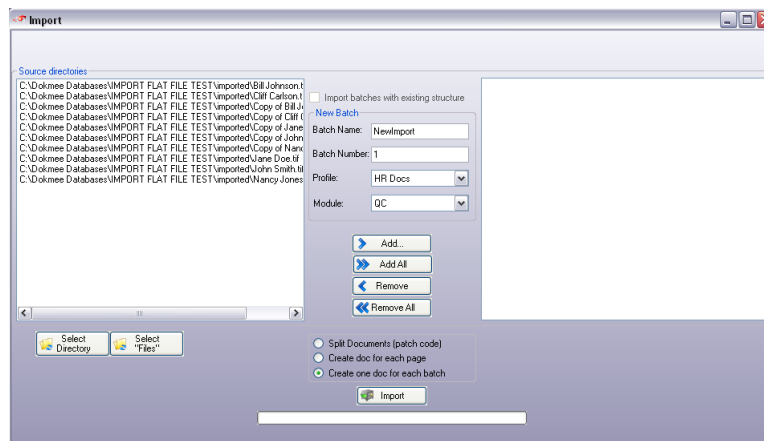
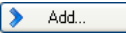
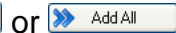


Figure 5-1. Import Module

Browse for the files to be imported. They will appear in the left side of the screen. Create a new batch to import the files to and choose the module that the batch should enter Diamond Vision in. Click either  or . The new batch will be added to the right side of the screen.

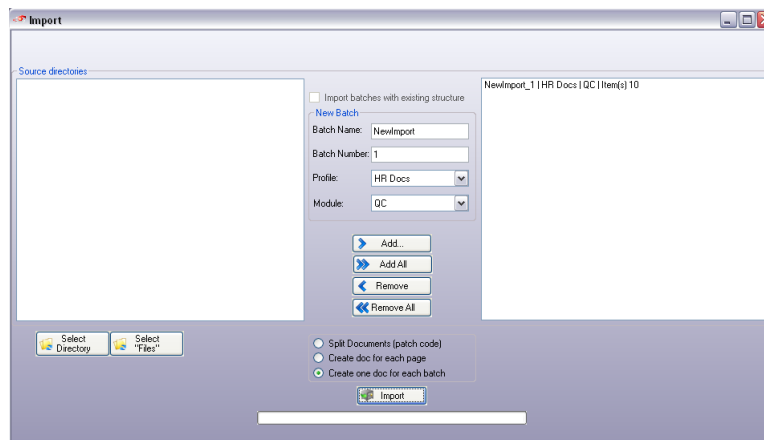


Figure 5-2. Import Module

Once all new batches for import are created, select the separation type, and click



Twain/Isis Selection

Diamond Vision is compatible with Twain and Isis Driver scanners. To scan with either set of drivers, go to: Scanner>Twain/Isis Selection. If the Driver method is changed, then Diamond Vision must be restarted for changes to take effect.

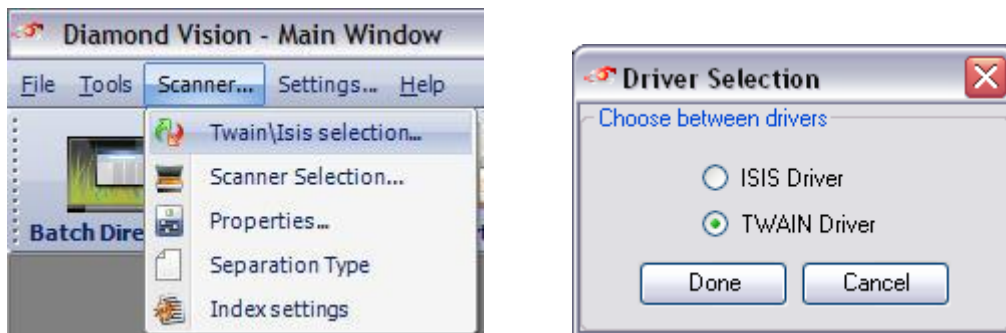


Figure 6-1. Scanner – Twain/Isis Selection

Scanner Selection

To select from a list of scanners installed on the computer, go to: Scanner>Scanner Selection. Diamond Vision will detect all Twain and Isis Driver Scanners automatically. When Diamond Vision is in Twain Scanning mode, only Twain drivers will be available. When Diamond Vision is in Isis Scanning mode, only Isis drivers will be available.



Figure 6-2. Scanner – Scanner Selection

Separation Type

The default separation type for Diamond Vision is Patch Code separation. The Diamond Vision Patch Code may be obtained from: Start>All Programs>Office Gemini>Diamond Vision>Patch Code Separator. This page may be printed on a laser printer and inserted into paperwork to represent document separation. When scanning, Diamond Vision will recognize the Patch Code as a document break rather than an image.

Separator

To change the separation type to a different barcode, choose a new barcode type from the drop down list.

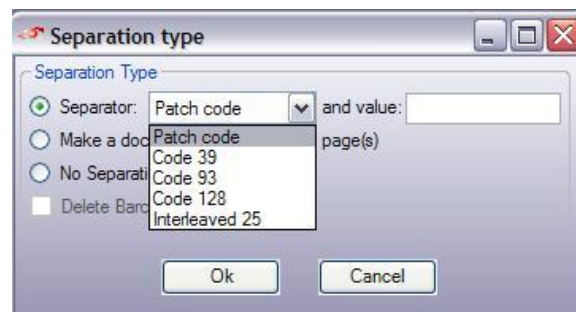


Figure 6-3. Scanner – Separation Type – Separator

Barcode Value

Another option for separation is to specify a barcode type and a specific value for Diamond Vision to look for in a barcode before separating the document.

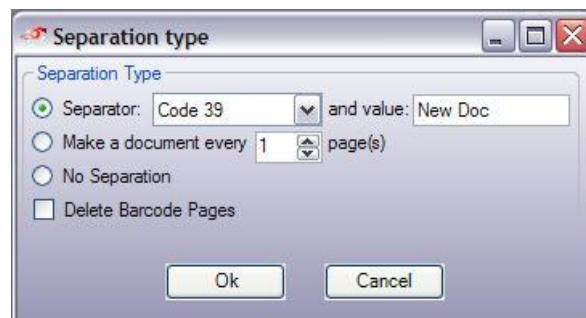


Figure 6-4. Scanner – Separation Type – Separator – Barcode Value

To use this option, select the second option for separation, choose the barcode type, and enter a value that is to be read to qualify the barcode as a separator.

Page Count

Diamond Vision is also capable of separating based on a number of pages per document. For instance if separation should be every three pages, place the page separation marker at 3. Diamond Vision will start a new document every three pages.

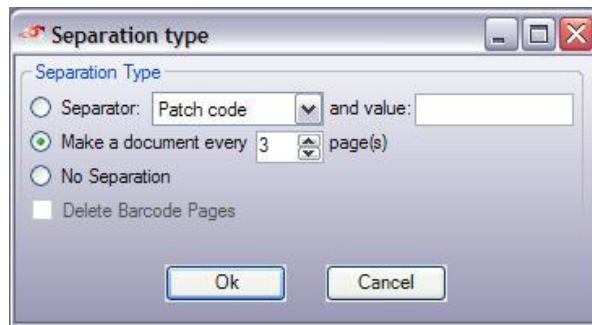


Figure 6-5. Scanner – Separation Type – Page Count

No Separation

To scan all pages into one large document, select No Separation.

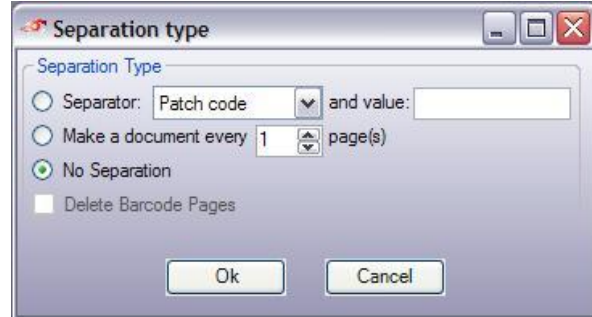


Figure 6-6. Scanner – Separation Type –No Separation

Scanning Documents

Twain Driver Properties

To access the Diamond Vision properties for scanning, go to:
Scanner>Properties.

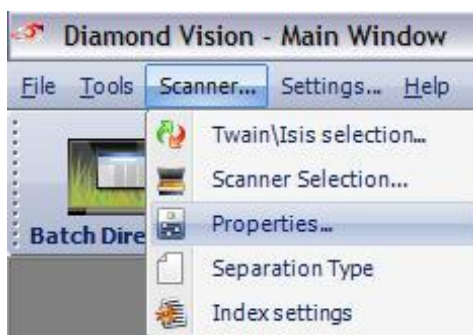


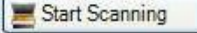
Figure 6-7. Scanner – Properties

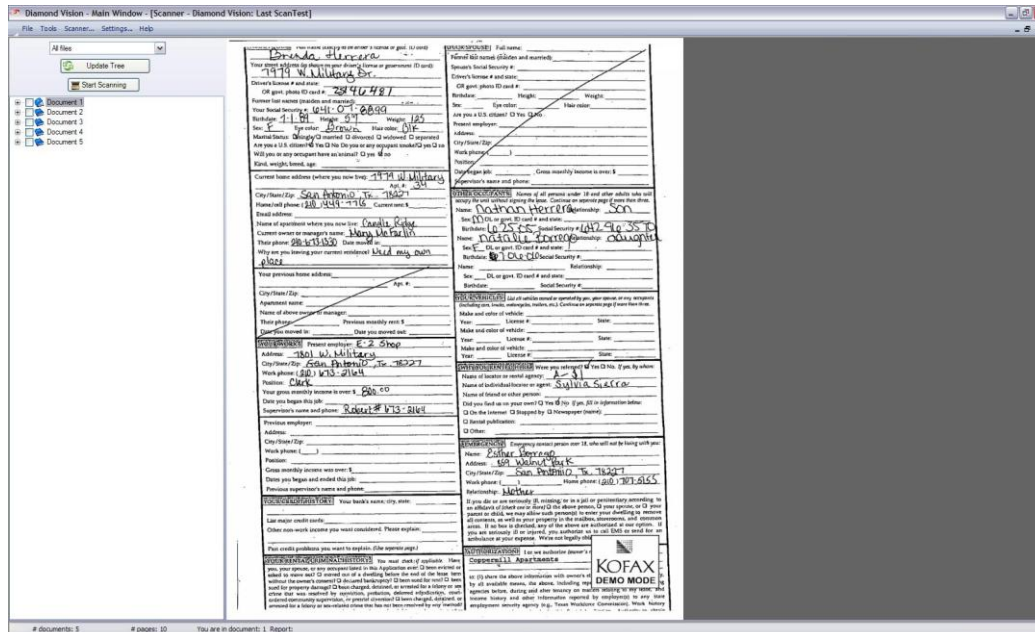
The properties for the Twain Driver include a blank back page removal used during duplex scanning. The recommended Threshold is 3000 Bytes. There is also an option to Hide Twain interface. When checked, this option will automatically begin scanning using the current driver properties set when the scan button is clicked.



Figure 6-8. Scanner – Properties - Twain

Scan

Once all separation options and properties have been set, click . The Twain driver properties window for the scanner will appear. This window will be different for each scanner installed. Choose any properties and image enhancements. Once scanning has started, images will flash as they are captured. Once scanning is complete, and the twain properties window is closed, the documents and pages will be listed in a hierarchal tree structure.



The screenshot shows the 'Diamond Vision - Main Window' with a menu bar (File, Tools, Scanner, Settings, Help) and a toolbar with buttons for 'Update Tree' and 'Start Scanning'. On the left is a hierarchical tree view showing 'Documents' and 'Document 1' through 'Document 5'. The main area displays a scanned document, which is a form titled 'KOFAX DEMO MODE'. The form contains various fields for personal and professional information, including name, address, phone numbers, and employment details. The form is partially filled out with handwritten text.

Figure 6-9. Scan Module

When scanning is resumed, documents will continue to be added to the end of the batch.

Closing Batches

To close the scan module, click the **x** in the top right corner of the screen.

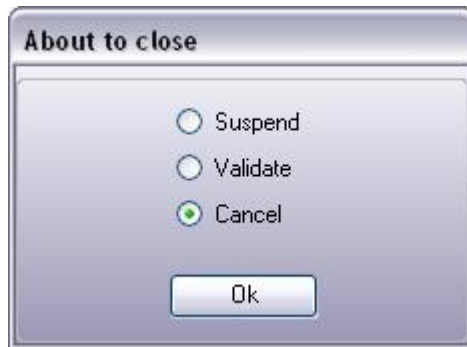


Figure 6-10. Scan Module - Close

Suspend

When closing the Scan Module, there is an option to suspend the batch. This will leave the batch in the Scan Module in Suspended status. Suspended status is an indication that the batch is not completed in the current module yet.

Validate

When closing the Scan Module, there is an option to validate the batch. Validating the batch will indicate it is complete in the Scan Module, and the batch will be moved to the Quality Control Module.

Quality Control

Functions/Keys

Many functions may be performed in this module. All functions may be performed by right clicking on pages or documents. Most functions may be performed using short cut keys:

Function	Key
Rotate Left	[
Rotate Right.....]
Mark for Delete	Del
Un-mark for Delete.....	\
Undo Delete	u
Insert.....	Ins
Append	a
Replace.....	r
Un-Flag	'
Flag.....	;
Split.....	s
Combine	c

Rotate: rotates the image clockwise at a 90 degree angle

Mark for Delete: marks page(s) or document(s) for deletion

Undo Delete: allows user to select from previously deleted pages to re-add to the batch

Insert: allows user to insert pages from a scanner in front of the page that is selected

Append: allows user to append pages from a scanner behind the page that is selected


Replace: allows the user to replace an image in the batch with new one from the scanner

Flag: allows the user to flag a document with a report

Split: allows the user to split a document into two documents

Combine: allows the user to combine multiple documents into one

Closing Batches

To close the Quality Control Module, click the  in the top right corner of the screen.

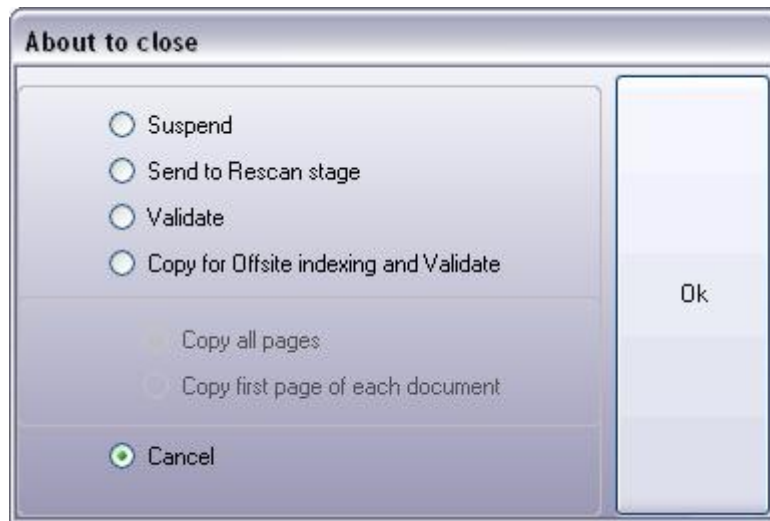


Figure 7-1. Quality Control Module - Close

Suspend

When closing the Quality Control Module, there is an option to Suspend the batch. This will leave the batch in the Quality Control Module in Suspended status. Suspended status is an indication that the batch is not completed in the current module yet.

Rescan

When closing the Quality Control Module, there is an option to send the batch to Rescan stage. This will leave the batch in the Quality Control Module but change the status to Rescan. This indicates that there images that need to rescanned in the batch.

Validate

When closing the Quality Control Module, there is an option to Validate the batch. Validating the batch will indicate it is complete in the Quality Control Module, and the batch will be moved to the Index Module.

Copy for Offsite Index

When closing the Quality Control Module, there is an option to Copy for Offsite Index. If selected, this option will send either the first page of each document or all pages of each document to the folder specified for Offsite Indexing in the Index Profile. The batch will then be sent to the Index Module. The images will be in the folder specified in the Index Profile as tiff images. They will be in a folder labeled ZQC_batchname_ReadyToSend. This will allow for the images to be sent anywhere for indexing and have text file of index information returned. Please see the Index Module section of this manual for instructions on importing the indexing file into the batch.

Index

The Index Module opens each batch with a listing of all documents in the batch. When a document has been indexed, the check box next to the document in the Indexed column will be checked. The batch may not be moved to the QC Index Stage until all check boxes are filled in for the batch.

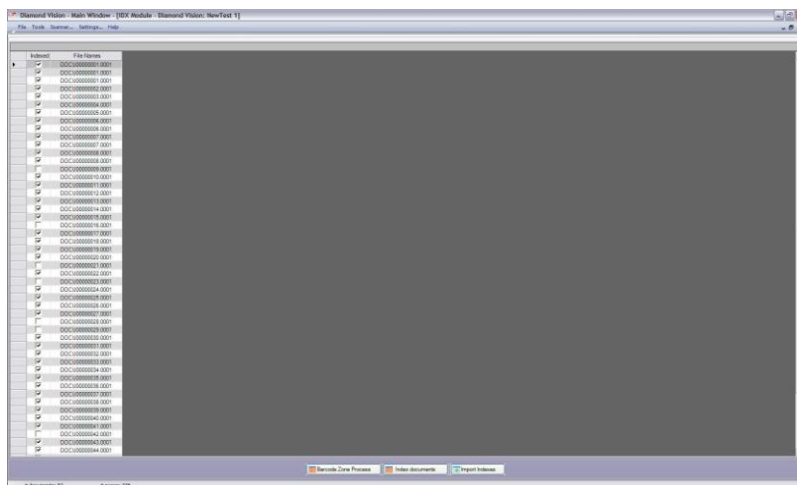
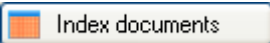


Figure 8-1. Index Module – Document Listing

Manual Indexing

Once the batch is open in the Index Module, click . The batch will be opened for manual indexing.

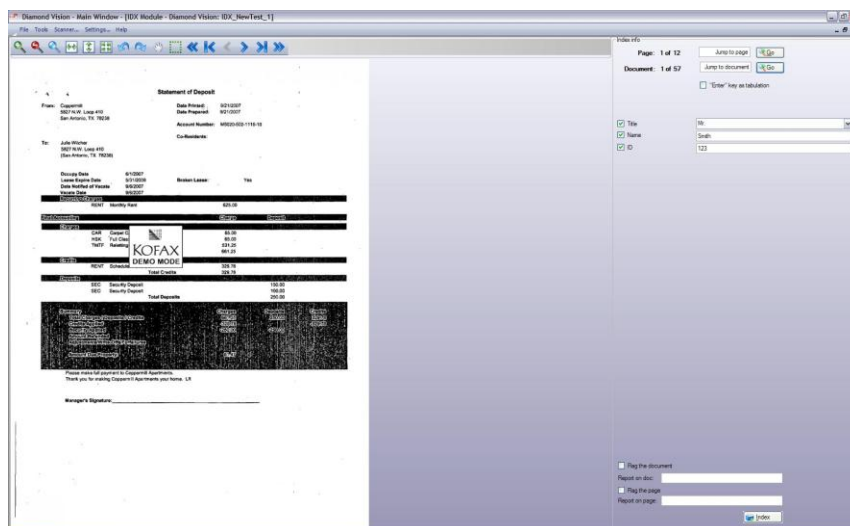



Figure 8-2. Index Module – Manual Indexing

Put the cursor in the first index field and enter a value. To move the next index field hit the Tab key on the keyboard. To use the Enter key to move to the next field, check the option next to “Enter” key as tabulation.

To make an index field a “sticky” field, check the box next to the index field.

There is an image toolbar above the viewer for navigation through the document and for zooming and rotation.

To use a database validation template that has been setup for the profile that the batch is in, first select the template from the drop down list in the top right corner of the screen. Once the template is chosen, then that database validation will be activated.

Once all documents have been indexed, the batch will return to the document listing screen of the Index Module, and all documents will contain a check mark next to them in the Indexed column. Click the  in the top right corner of the screen. Select the QC Indexing option.

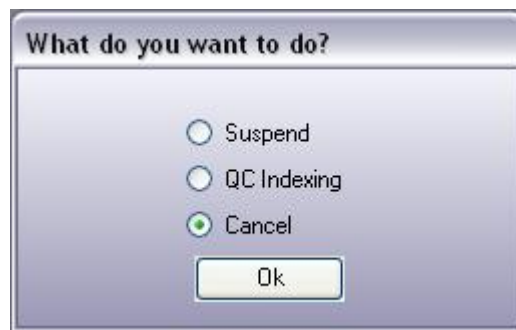



Figure 8-3. Index Module – Manual Indexing – QC Indexing Prompt

Import Offsite Indexing

Once the batch is open in the Index Module, click . Diamond Vision will go to the ReadyToImport folder in Central Path and look for the txt file named ZQC_batchname_ReadyToSend. Make sure that the text file is placed in the folder before attempting to import the indexing. The text file must be a pipe delimited text file with the document name as the last value in each line. The Profile Name must be the first line of the text file.

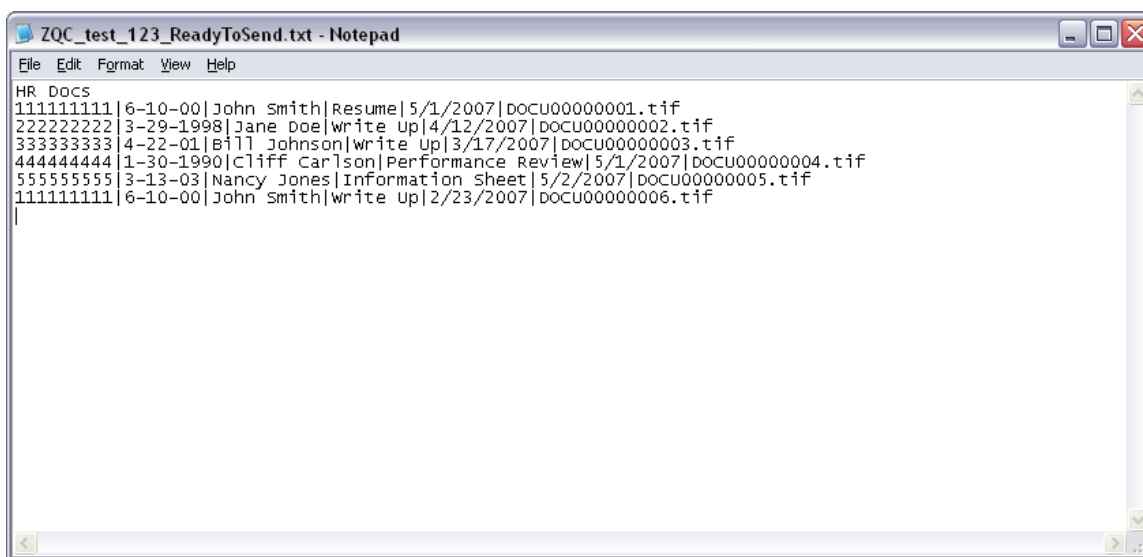


Figure 8-4. Index Module – Offsite Indexing – Text File Format

Once the indexing is complete, all documents will contain a check mark in the column labeled Indexed. Proceed to the QC Indexing process.

QC Indexing

Once a batch has been fully indexed, it is ready to go through the QC Index process.

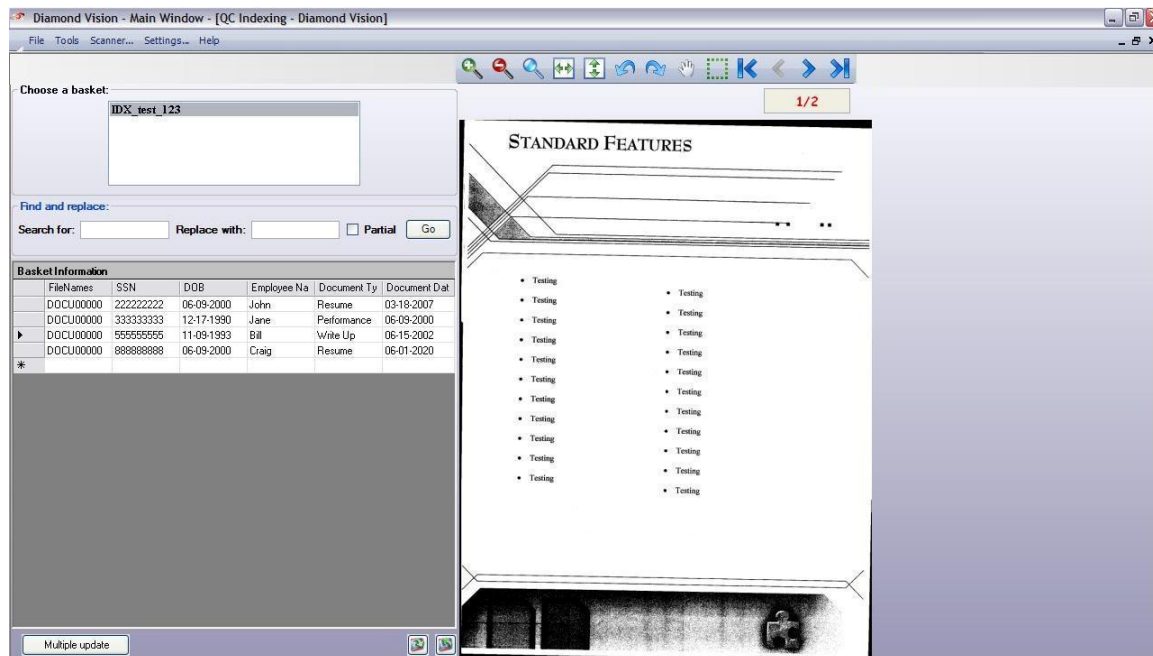


Figure 8-5. Index Module – QC Indexing

The QC Index module allows a final quality check on the accuracy and integrity of the indexing. The index values of each document are displayed in a row on the grid. To view the document in the viewer, click on the row in the grid. The document selected will be displayed in the viewer.

There is a search and replace function in this module as well as a multiple index update function. The search and replace allows the user to find certain characters, words, or phrases and replace them with alternate values. The multiple index update allows the user to update a field with the same value for multiple documents at one time.

Once QC Indexing is complete, Validate the batch. The batch will be sent to the Export Module.

Export

The Export Module is the final stage of each batch in Diamond Vision. In the is stage batches will be exported from Diamond Vision to a directory as either Tiff or PDF files along with an index flat file.

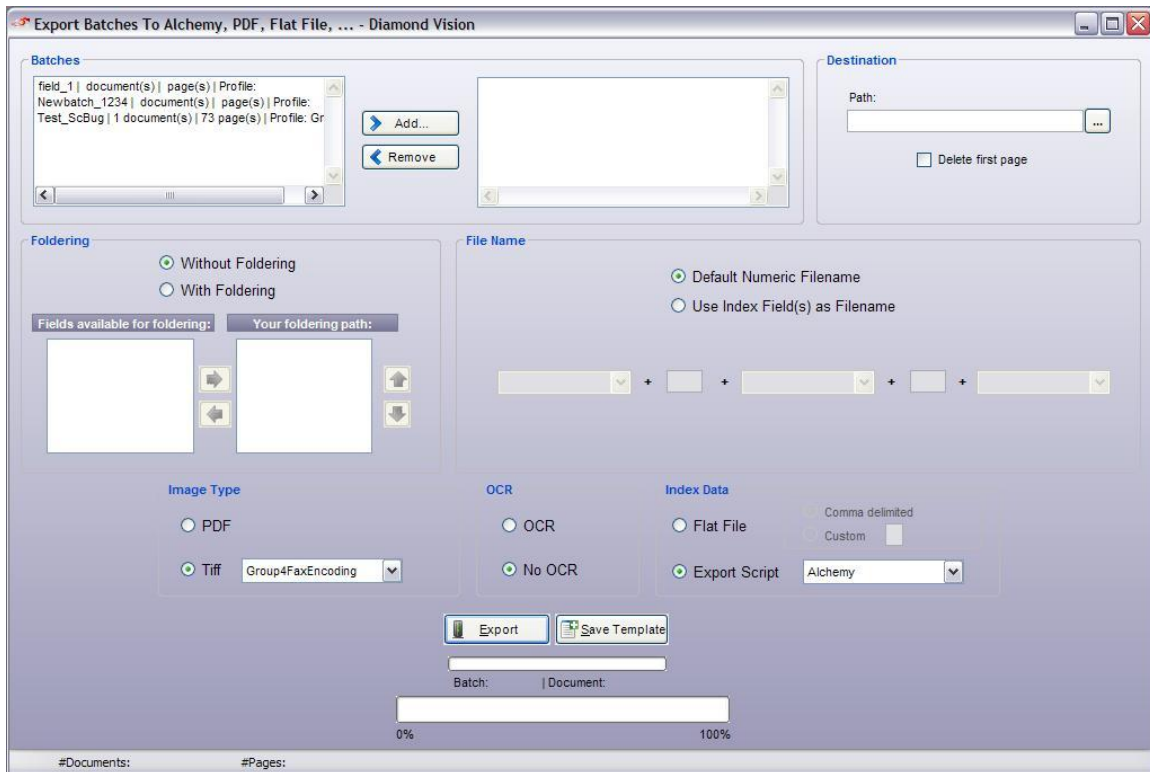


Figure 9-1. Export Module

Choose Batches

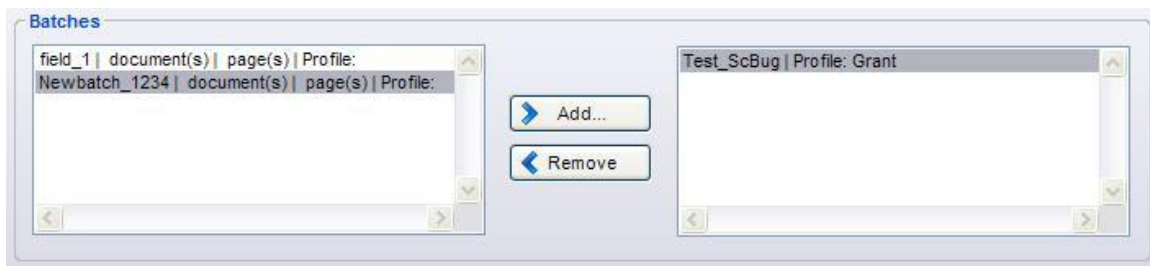
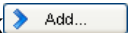


Figure 9-2. Export Module – Choose Batches

All batches currently waiting in the Export Module will be listed in the left list view. To add a batch to the current export job, select the batch and click . Multiple batches may be exported at one time.

Destination Path & Foldering

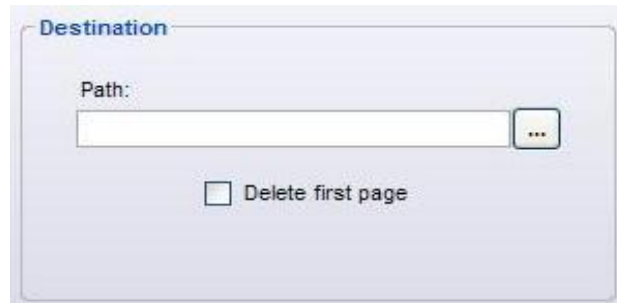
The screenshot shows a dialog box titled "Destination". It contains a "Path:" label followed by a text input field and a button with three dots "...". Below the input field is a checkbox labeled "Delete first page".

Figure 9-3. Export Module – Destination Path & Foldering

Choose the directory in which the batch(s) should be exported to. Then choose if any index values should be used to automatically create folders in the destination path.

File Name

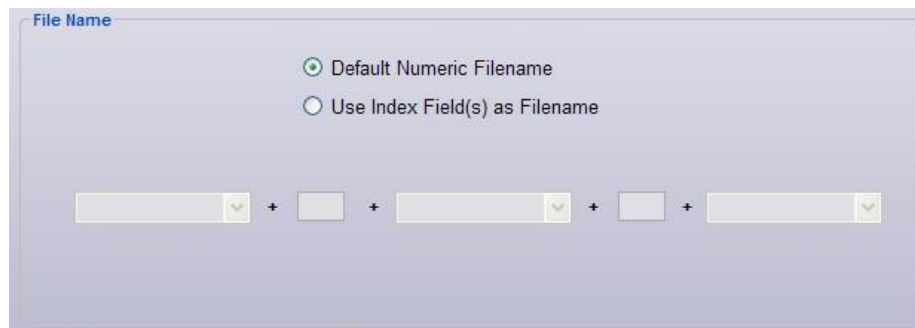
The screenshot shows a dialog box titled "File Name". It has two radio buttons: "Default Numeric Filename" (which is selected) and "Use Index Field(s) as Filename". Below the radio buttons is a field for constructing the filename, consisting of a dropdown menu, a plus sign, a text box, a plus sign, another dropdown menu, a plus sign, a text box, a plus sign, and a final dropdown menu.

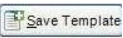

Figure 9-4. Export Module – File Name

By Default Diamond Vision will name each exported document by the document number in the batch. If an index value is to be used for the file name, choose which field(s) should be used.

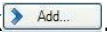

Index & Compression Type



Figure 9-5. Export Module – Index & Compression Type

Choose the format that the text file should be exported in and whether Tiff or PDF will be exported. Select the compression type if exporting as Tiff. To save Export Template click . Once all options are set, click .

Blank Page Removal

The blank page removal option is used in cases where batches lead sheets are blank and need removal. This option will remove all blank pages inside selected batches. Select the batches to process, and click . Once the batches have been selected, click .

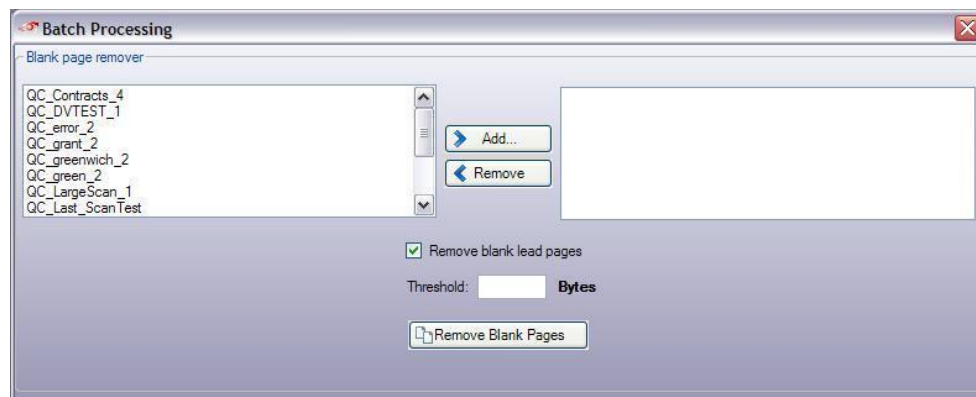


Figure 10-1. Blank Page Removal

Barcode/OCR

Barcode Template

The Barcode/OCR template feature in Diamond Vision is used to index documents by using Barcodes 39, 93,128 and Text OCR.

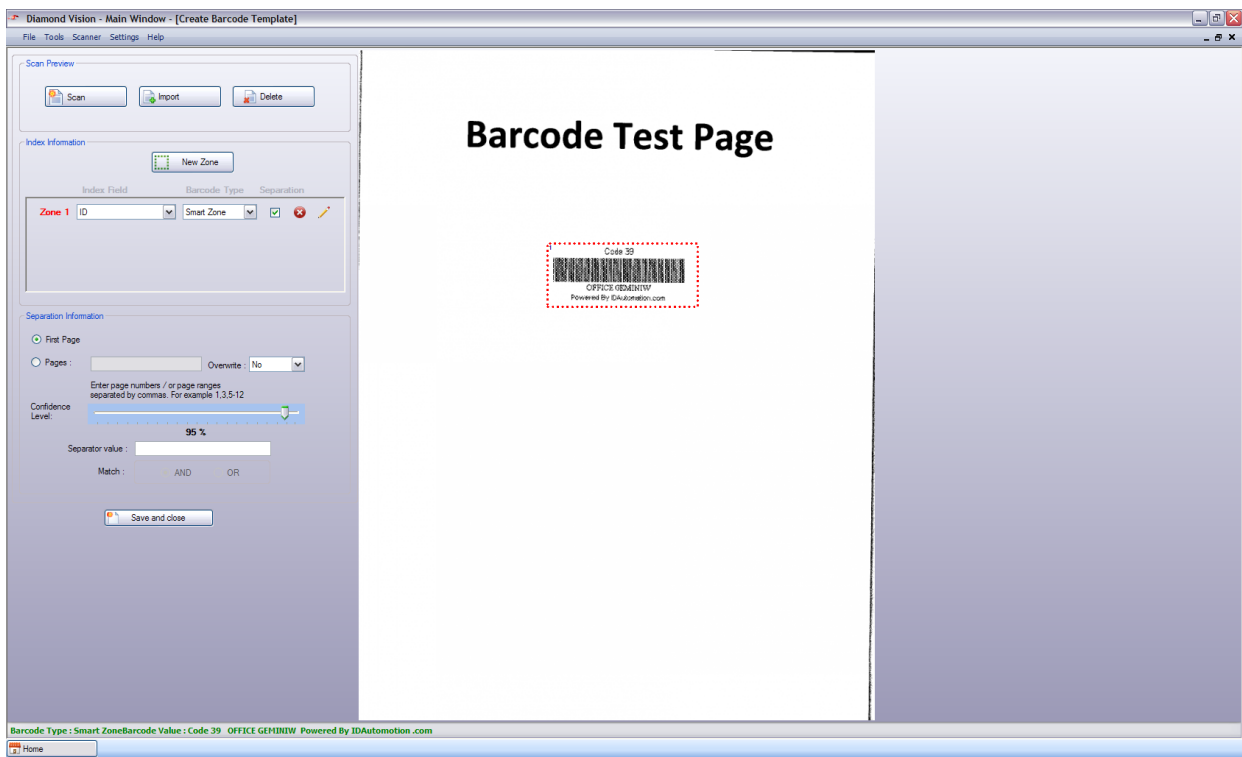





Figure 11-1. Barcode/ OCR Zone

In the Barcode Module the user will have the option to scan or import a document into Barcode/OCR template. To scan a new document, click . To import a document, click . After a document has been scanned or imported, the user can then create or modify any existing zone. To create a new zone, click .

	Index Field	Barcode Type	Separation
Zone 1	None	Code39	<input checked="" type="checkbox"/>
Zone 2	grade	Code39	<input type="checkbox"/>
Zone 3	hello	Code39	<input type="checkbox"/>

Figure 11-2. Barcode/ OCR Zone – Index

Once all zones have been created or modified, the user can then index each zone. If the separation box is chosen, a new document will be created every time the barcode module scan's a zone with the matching Separator value.

☒ First Page
☐ Pages : Overwrite :

Enter page numbers / or page ranges separated by commas. For example 1,3,5-12

Confidence Level: 70%


Separator value :

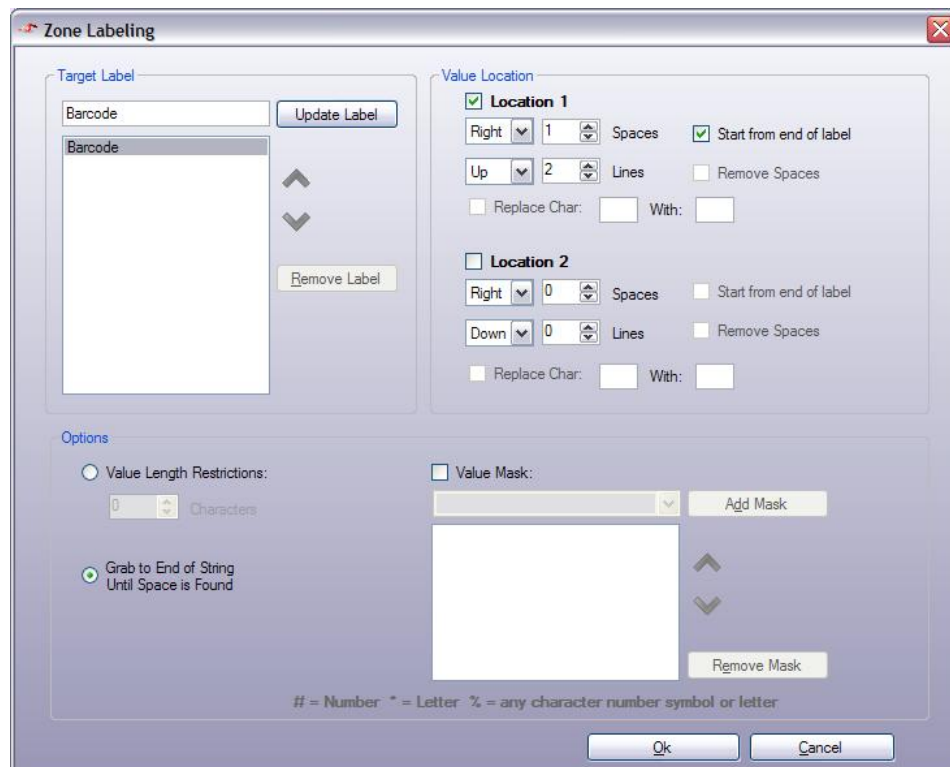
Match : ☒ AND ☐ OR

Figure 11-3. Barcode/ OCR Zone – Separation

In this section of the section the user can edit the separation information. The user can choose to index only the first page of each document or certain pages. If multiple indexes are found in zone areas, the user has the option to overwrite the index information for that document. Confidence level is use for determining a text OCR value. It is recommended to the user to adjust confidence level according to how accurate they want the indexing to be. Example: If confidence level is high, the barcode module will separate any document within any recognition of the separator value. If the confidence is low, the module will only separate documents that are more accurate to the separator value.

Smart Zone

The Smart Zone feature of Diamond Vision allows users to create zones around large areas of textual information and grab the desired index information, from anywhere in that area of the document by searching for a target label rather than a specific zone area. To create a smart zone first select it from the barcode type; next select the pencil icon  , and the zone labeling window will appear.



Under the target label area, the user can specify what label name to look for. Next the user can select the value location. This is to specify the number of spaces, left or right of the target label; or the number of lines, up or down of the target label, from where to grab the index information from. Other options are to remove spaces from the value. Start from the end of the label, so that you may adjust the spacing. Replace characters, allows users to search & replace characters from the value location. Under the options section, the user can also set a value length restriction, or specify to grab to the end of the string or until a space is found. The Value mask option allows you to enter a format to adjust the value information such as a phone number as an example; to add in the parentheses or dashes. Once the label has been selected click on add label to add it to the label list. In order to remove a label click on the label to remove, then click on remove label. To edit a label, double click on the label, and click update label to save any changes.

Batch Processing

Barcode Processing

Batch Processing allows Diamond Vision to index batches through the Barcode Process.

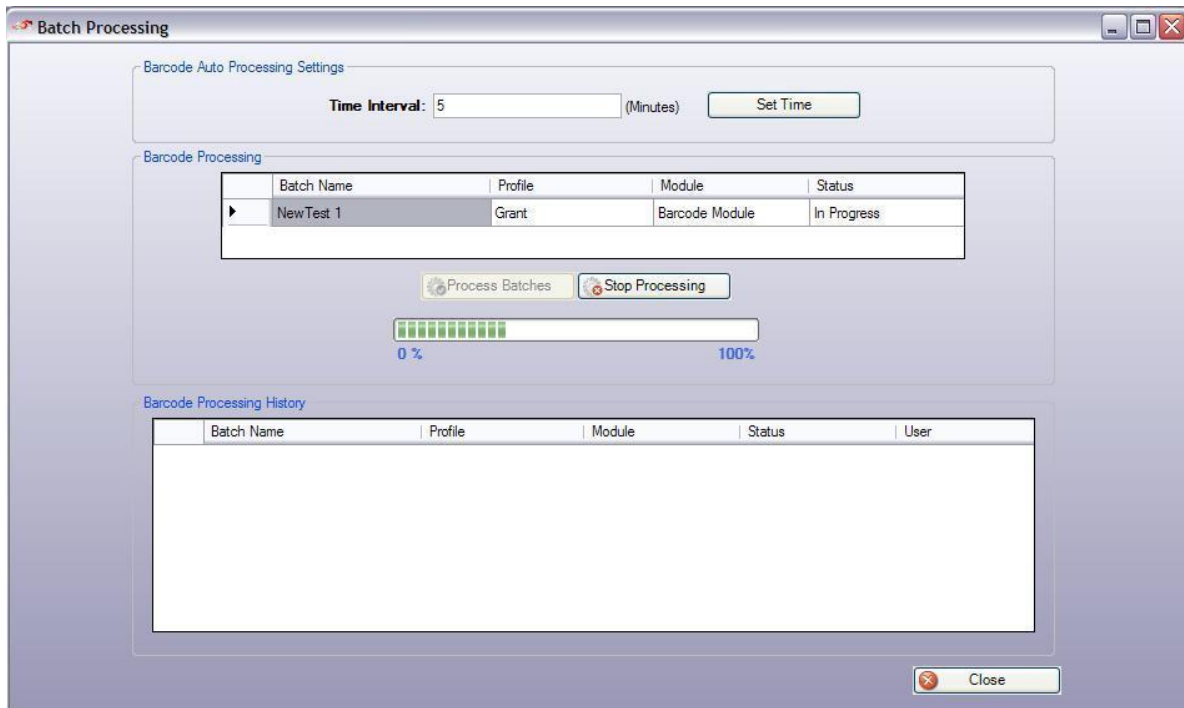


Figure 12-1. Batch Processing

In the Batch Processing, the batches with barcodes are processed through Barcode/OCR module. The user can set a time interval to search for batches with barcodes by clicking . Once a batch is found, the batch will appear in Barcode Processing window. To process batch in the Barcode window, click . In order to stop a processing batch, click .

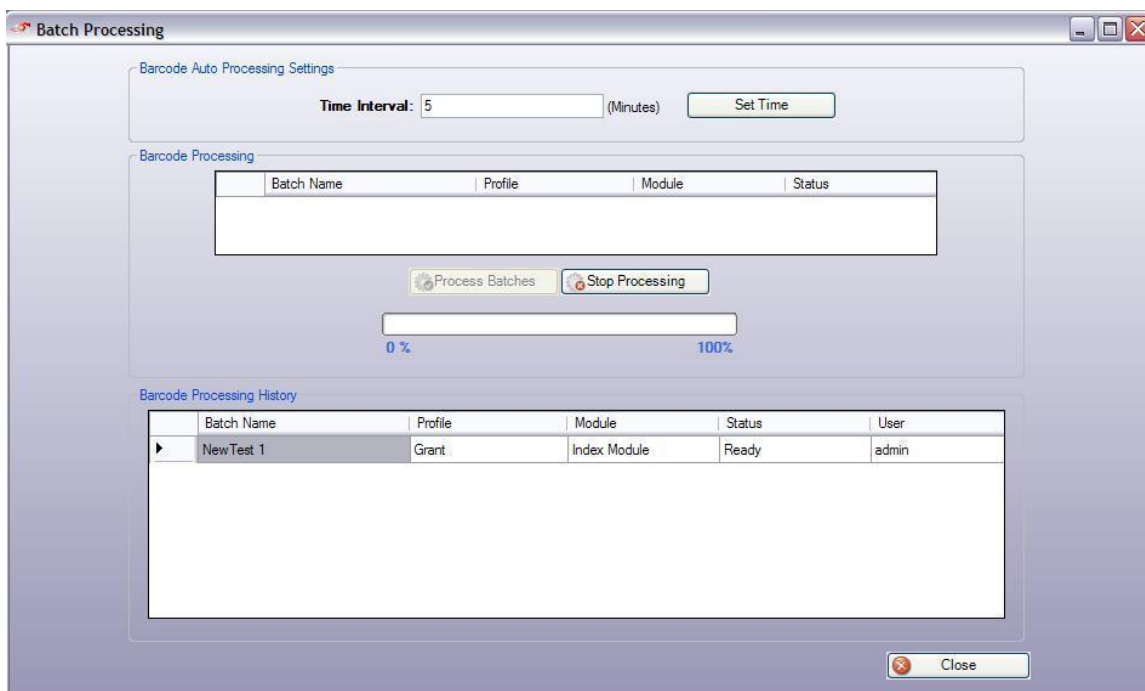


Figure 12-2. Batch Processing – Complete

Once the Barcode Processing is complete, the batch will appear inside Barcode Processing History. To exit, click  **Close**.